SPITFIRE
SPARK CHANGE

Smart Chart™ 4.0

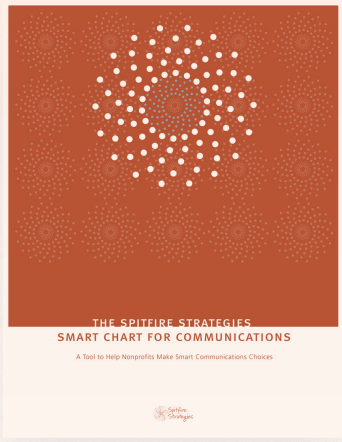
Make smart communication choices

Introduction

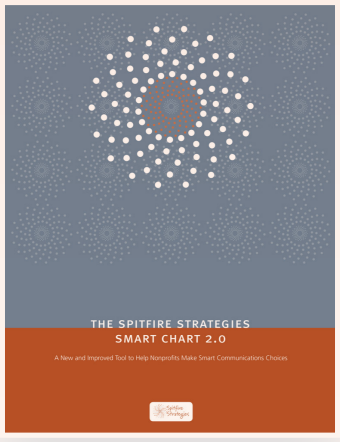
In 2002, the David and Lucile Packard Foundation asked if Spitfire could write the definitive how-to guide to communications planning. We knew it had to work for diverse groups advancing various issues around the world. It had to apply to all kinds of goals, from advocacy to behavior change to fundraising. And – here's the kicker – it had to be easy to use, engaging and fun.

OK, challenge accepted. The result, after talking to nearly 100 communications experts, was the Smart Chart 1.0. And it was pretty smart to start. But then we took it on the road and vetted it with thousands of groups. Their feedback led to Smart Chart 2.0, which was more user friendly. Smart Chart 3.0 added in behavioral sciences and emerging communication practices that are now best practices.

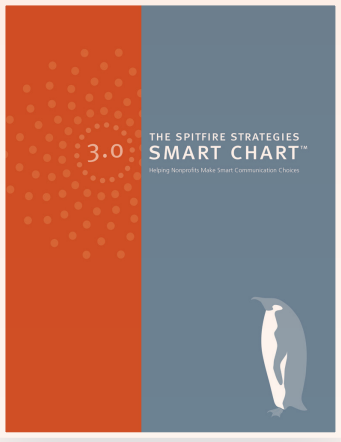
Smart Chart became a one-of-a-kind planning tool. The cornerstone of countless social change campaigns around the globe, translated into multiple languages including Spanish, French, Urdu and Tagalog.



SMART CHART 1.0



SMART CHART 2.0



SMART CHART 3.0

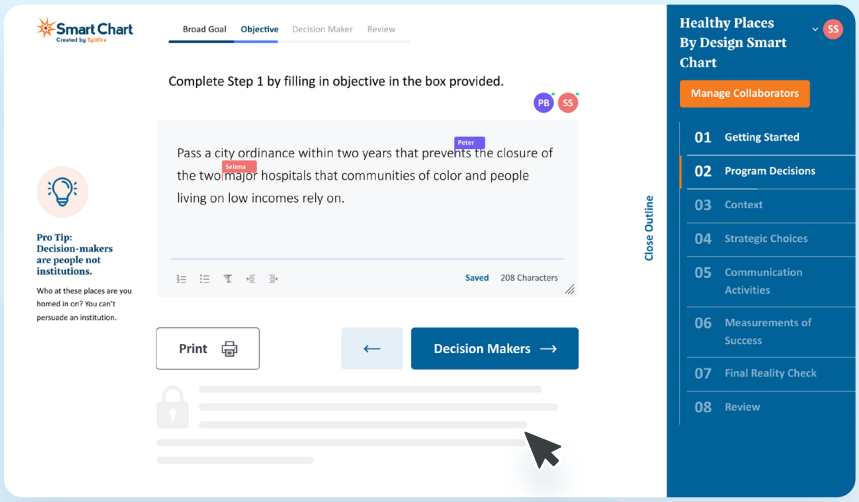
And then, 2020. The COVID-19 pandemic sent the world into a downward spiral and further exposed systemic inequities that disproportionately affect Black and Brown people. Uprisings in the United States and other countries demanded an end to centuries of anti-Black racism and other oppressions. Combative elections stoked higher levels of division. Courageous leaders in organizations big and small found ways to navigate challenges and meet the moment. In this context, Smart Chart 4.0 came to be.

Smart Chart 4.0 highlights equity and racial justice, evolves the thinking about framing and integrates brain science research. We also redesigned and improved the online tool. Whether you are working on your first communication strategy or your 100th, the Smart Chart will work for you.

There is no better time than right now to do communications planning. You communicate every day. If you aren't doing so strategically, opportunities are passing you by. Focusing on when and how to use your voice, whom to engage, how to build on your strengths while recognizing your challenges and how to motivate people to help you is always time well spent.

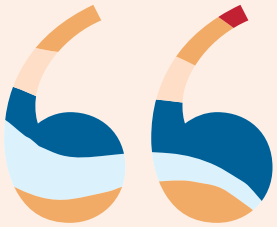
We'll walk you through it. Get your team together. Hydrate. Take a deep cleansing breath, and let's go.

> **There is no better time than right now to do communications planning.**



SMART CHART 4

Ready? The Smart Chart 4.0 tool is available for you to fill out in digital or hard copy.



if you don't know where you are going, any road leads you there.

– Lewis Carroll

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Getting started

Smart Chart 4.0 features five decision steps:

01 Decide what the organization wants to do

02 Identify the context of your work and what you have to work with

03 Make strategic choices about your audiences and messages

04 Determine high impact activities to reach audiences with messages

05 Create measurements of success

Creating your Smart Chart is a linear process. Start with Step 1 (Decide what the organization wants to do) and proceed in order through Step 5 (Create measurements of success). Each decision you make in the Chart is based on the decision you made before it. For example, you need to establish your goal and objective before you can name the decision-maker. After all, if you don't have a clear objective, how will you know the best person to help you achieve it? Likewise, when making strategic choices, identifying your audience must come before creating your messages, since you will tailor the messages to that audience. You get the idea. If you decide to go back and change a decision in your Smart Chart, that's fine. Just know that the decisions you made after that revision may need to change too.

As you plan, have a solid rationale for each of your decisions. If you are relying on an assumption, find or conduct research to validate your educated guess. Run your ideas past people who will be most impacted by the issue or who work closely with your decision-maker. With a strong foundation for your decisions, you can confidently engage your most important audiences: the ones who will act on your behalf.

There are five different types of advice boxes:

Pro tip:
These are suggestions to help you make your Smart Chart even smarter. We have collected these from many of the Smart Chart users over the years.

Deeper dives:
The latest version of the Smart Chart includes sections that go deeper into the science and strategy behind successful commnucations.

Science says:
The Smart Chart was not just built on our collective experience but is based in behavioral science. Use this section for more details about the science behind smarter communications.

Examples:
We constantly update our Smart Chart with the latest examples of smart communications. You can learn more from these sidebars.

External resources:
There are so many great tools to help your organization communicate more effectively. We have included just a few throughout the Smart Chart to add to your tool belt.

Step One:

Decide what your organization wants to do

To paraphrase the Cheshire Cat in Lewis Carroll's "Alice's Adventures in Wonderland," if you don't know where you are going, any road leads you there.

The good news is that you know where you are going. Write down what you want to achieve in your organization, project or program. Who is going to decide whether that happens? Identifying at the beginning your goal (the change you want to create), objective (the first step to get there) and decision-maker will help you create a strong communication strategy. Those are fixed points in your Smart Chart. Never lose sight of them.

What's the big picture?

Your mission and goal

All good communication efforts are rooted in a vision for change. This is likely the reason your group was created – your mission. It may be to ensure reproductive justice, to protect Black and Brown people from systemic racism, to ensure that every family in your community has affordable and nutritious food, to provide affordable housing, to protect wilderness areas or to make arts and cultural programming available to every student. This could be a big, tough change or a small but mighty one; but it is usually reflected in your mission statement. It explains your group's purpose, whom you serve, your core values and principles, what you are working toward and how you expect to do it. Other items you may have – like your organizational strategic plan, theory of change or logic model – could also inform how you create your strategic communications plan by reminding you why you are doing this, for whom and how your group commits to doing its work.

To achieve your mission, you likely need to achieve many goals. If your mission is to get everyone to take the census, your goal may be to increase the number of people from chronically undercounted populations who fill it out. It may not be something you can achieve in a short period of time. While your goal may take 10, 20 or 30 years to achieve, it's impossible to create a single communication plan that will last that long. Things change!

> **Objectives can be behavior change (getting people to either start or stop doing something), policy change (either government or corporate policy) and fundraising.**

Consequently, most concrete communication strategies are focused on the near term – like 24 months or less. That's the recommended time frame for your Smart Chart as well.

So, how do you reconcile a 20-year goal with a two-year plan? Simple. Break your goal into smaller pieces. Create steps you need to take to get to the goal, then plan your communication efforts to support those incremental points of progress. That's what we call an objective.

What concrete step will you take to achieve your big goal?

Your programmatic objective

A goal is the victory that requires many decisions to accomplish – like getting the Arctic National Wildlife Refuge named a national monument or making sure every worker has paid leave. Think about all the things it will take to achieve the goal. In the case of paid family leave, for example, you'll have to raise money, get companies to adopt voluntary policies, pass policy at the state and federal level, and get workers to take leave rather than go to work sick.

Each of those are their own objectives that require communication to become reality. They are stepping stones to your goal. Each represents a step forward, and some need to happen simultaneously. Objectives are the Smart Chart's heart, so make sure your communications are focused on this priority. Establishing concrete, measurable objectives is the next step in your overall plan for achieving your goal.

Objectives can be behavior change (getting people to either start or stop doing something), policy change (either government or corporate policy) and fundraising.

A well-defined, specific objective is essential for a good communication strategy. If your objective is too broad or vague, the decisions you make from this point forward will lack precision, virtually guaranteeing an ineffective result. An ideal objective is measurable (you can tell whether you have achieved it) and should represent a clear program aim or action that your group or project can accomplish within a two-year time frame. In a word, your objective should be **SMART: Specific, Measurable, Attainable, Realistic, Time-bound**. Let me break it down for you:

S	M	A	R	T
Specific	**Measurable**	**Attainable**	**Realistic**	**Time-bound**
The objective should be a clear expression of what you are trying to do (no vague or general terms).	This is a result or number that shows whether you actually achieved your objective.	With everything happening outside your organization, can you get this done?	With the capacity and resources available inside your organization, can you do it?	How long will it take to complete your objective? It needs to happen within a 24-month period.

More often than not, organizations need multiple objectives to achieve their goal: the stepping stones mentioned before. If that's you, develop a separate Smart Chart for each objective. It is likely that the decision-makers, audiences and messages for each objective will be different.

For example, if an organization wants to advance racial justice by ending discriminatory discipline practices in schools, it can advocate to increase the number of teachers who take implicit bias training (behavior change), hire more teachers who are from the same community as the

> **Watch out for vague objectives such as "raise public awareness."**

students (school system policy change), raise money to offer scholarships to teachers to cover costs (fundraising), get schools to voluntarily track data to understand whether they have an issue and how severe it is (school policy change), pass legislation that replaces suspension and expulsion with other interventions (public policy change), or link school funding to low suspension and expulsion rates to incentivize more equitable practices (public policy change). Each is a different objective with different decision-makers and requires different communications.

No "magical" objective setting

Watch out for vague objectives such as "raise public awareness." Usually "public awareness" is not an objective in and of itself. It is a midpoint on the road to changing behavior or a means of putting pressure on political or corporate leadership. You could do a poll before and after your efforts and determine that many people were aware of your work, but that didn't necessarily change their behavior or compel them to take action. "Raise awareness" is incomplete. Ask yourself: Why do you want to raise awareness? What will awareness do for you? Will you use it to pressure the city council to pass a bill to block evictions, change consumer behavior to reject single-use plastics or force drug companies to decrease the cost of immunizations? The "why" is your objective.

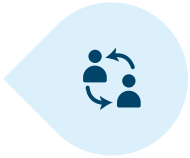
State a specific objective and then decide how you are going to measure your progress toward that objective. "Increasing racial equity" or "improving family health" are certainly worthy aspirations, but they are big goals, not concrete objectives. "Increasing the number of Black school teachers and administrators by 10% before the next academic year" and "providing health care coverage to 15% more children in three counties in the next 18 months" are achievable objectives that lead up to your big goal.

Examples of SMART objectives

Goal: End health disparities in our city.

POLICY

Policy Objective: Pass a city ordinance within two years that prevents the closure of the two major hospitals that communities of color and people living on low incomes rely on.



BEHAVIOR CHANGE

Behavior Change Objective: Train 33% of county health care staff on the impact of systemic racism in health care within the next 12 months.

FUNDRAISING

Fundraising Objective: Raise $200,000 by next fall to develop and implement cultural competency training for community health workers in specific facilities.

Goal: Ensure every family in our state has reliable and affordable broadband.

Policy Objective: Establish a state agency dedicated to the equitable expansion of broadband internet service within the next two years.

Corporate Policy Objective: Urge the state's leading broadband provider to provide free service to at least 15,000 households by the end of the current school year and double it in the year after.

Behavior Change Objective: Get 5,000 residents to sign up for broadband in the next 18 months.

Fundraising Objective: Raise $6 million from local philanthropy to establish a distance learning fund that provides services and equipment to families in the state by the beginning of the next school year.

Who makes your objective a reality?

The decision-maker

The ultimate decision-maker is the person (or people) who has the power to give you what you want – the person who can say yes or no to your objective.

If your goal is to support farmers through the promotion and sale of fair trade coffee, one behavior change objective may be to increase the number of coffee drinkers asking for and purchasing fair trade beans and brews. The customer is the decision-maker. They will buy that fair trade cup, or they won't.

If your corporate policy objective is to persuade an industry-leading restaurant chain to purchase and sell only fair trade-label coffee, the decision-maker may be the CEO.

Whoever ultimately can say yes to what you want is your decision-maker.

> **You can only have one decision-maker per Smart Chart.**

Sometimes the final decision-maker is mandated – the governor has to sign the bill – and sometimes you can decide where you want the decision to be made. For example, instead of going to the gridlocked legislature, you can get a major corporation to raise workers' salaries to a livable wage. Then you can use that victory to pressure other corporations to do the same.

Determining your decision-maker requires you to be specific. The decision-maker may be an individual (e.g., the governor) or a group of people (e.g., Latina mothers of elementary school-age children in a specific school district), but the decision-maker cannot be multiple groups or individuals. It should not be both the Environmental Protection Agency administrator and specific members of Congress. You need a different communication plan for each of those decision-makers because they will require different strategies, asks and approaches.

Later in the audience section, you will decide whether you are going to approach the decision-maker directly or reach them through other people such as influencers or related audiences. Your organization may not have direct access to the decision-maker. But once you have identified whom you need to influence or activate, you can figure out how best to reach them.

Easy, right? Go to Smart Chart 4.0. Complete Step One by filling in your goal, objective and decision-maker in the chart provided.

Pro Tip

Decision-makers are people, not insitutitions. Don't say the Environmental Protection Agency or Amazon is my decision-maker. Which people there can you engage with? You can't persuade an institution.

Step Two:

Identify the context of your work and what you have to work with

Here, think about the communication environment – the situations you will have to navigate to engage your audience. What's working for and against you inside and outside of your organization? An internal scan considers an organization's assets and challenges not only from a capacity perspective but through its reach, influence and expertise. An external scan is your best opportunity to assess the outside environment for your communication efforts. Is it conducive or unfavorable? You will also explore where your issue sits with people you want to motivate. Make an honest assessment. These scans will inform your communication messaging and activity decisions later in the Smart Chart.

What do you have going for you?

Internal scan

Look inside your organization. Consider all the things you control that may impact your communication efforts. What strengths can you build from that will help you succeed, and what limitations may hold you back?

Start with staffing, resources and skills. Are they assets or challenges? Is your organization a media machine (asset), or is it mostly academics who use complicated jargon when they talk to the press (challenge)? Do you have access to in-house research like polling or community member insights or other knowledge that can help inform your strategy?

Do you have a flood of compelling stories or are you experiencing a drought? Do staff members actively use social media to talk about your issues? Do you have thousands of followers or, at least, followers who are influential or neither?

Think about your reputation: Are you well-known or little known? Does your staff reflect the diversity of your partners? Does the community or your most important audiences trust them? (If you can answer yes to the latter two questions, this is an asset.) Are you part of effective coalitions or partnerships that can, or should, be involved in this effort, or do they get little done? Within these coalition or community groups, are there events, assets, skills and power you should consider in your communication activities and planning efforts?

Is there funding and enough staff to support this objective, or do you need to find both? Is this a top organizational priority or an afterthought or emergency?

These are just a few examples; add your own. Remember, you control these skills, resources and capacities. You know what's working in your organization and what needs shoring up. You want to build a communication strategy that leverages your strengths and minimizes your weaknesses. In addition, the resource questions will drive what kind of reach and scale you can have and which tactics are possible.

Is your issue hot or not?

What in the world is happening?

External scan

Take stock of what's happening outside of your organization that will affect your communication strategy and activities. Complete this scan often, especially during turbulent times, because things change quickly. Consider some of the following, and add your own thoughts.

Is your issue hot or not? Is the debate on your issue favorable or unfavorable for you? Is the news coverage, social media chatter and public discussion generally favorable, negative or nonexistent? Are there lots of funders in this space or just a few?

Are there timing considerations or key events that you must factor into your strategy? Are there natural communication opportunities that can help advance your strategy, or will you need to create them? Is there opposition actively working against you? Are other organizations aligned but competing for attention and resources?

If you want to solve a problem, is it well-known and understood? Are there misconceptions, misinformation or various narratives that may hinder your communication efforts?

Is there a history that may help or hurt your proposed solution? Is there a systemic barrier that you must address?

Remember that external factors are often beyond your control. Yet, they will affect what you can do and how your work plays out. They evolve, so if you haven't taken the pulse in a while, it's always good to do an update. That can help you identify new or emerging opportunities and highlight challenges you need to address so you don't run into a brick wall. Ouch.

Are you well-positioned to have the conversation you need to have?

Define your position: What's a good frame for you?

Think of frames as mental shortcuts that we rely on to quickly make sense of information and guide behavior.

Strategic communication seeks to seed, shape and drive conversations that will motivate those you want to engage to take a specific action. Framing is one way that happens. Frames, which cognitive scientists describe as "mental structures that shape the way we see the world," set the broad terms of the debate, give shape to the discussion and define clear boundaries for how to think about an issue. Just like a picture frame, this shows what's in the picture, where we should pay attention and what the picture means.

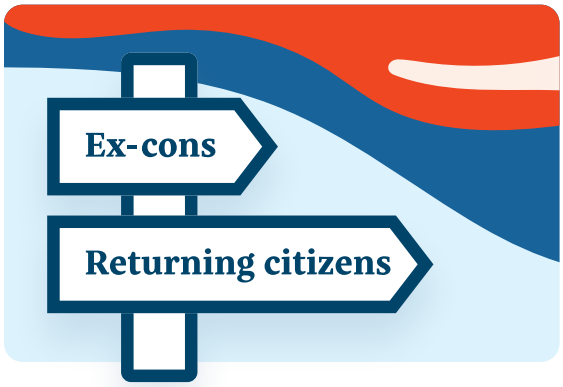
Think of frames as mental shortcuts that we rely on to quickly make sense of information and guide behavior. The language, metaphors, people and solutions we choose to communicate about are all elements that will bring up certain frames for audiences. This is important to know because studies from Adrian Furnham and Hua Chu Boo[1] show that the first frame we experience on an issue becomes an anchor or reference point that we keep coming back to. Strategically framing issues is an important tool for moving people away from the frames or "anchors" that do not advance your work or harm the communities you're working with.

SCIENCE SAYS

Science Says: "Is There a Problem?"

People discount issues they see as far away in time and space. That is called "temporal discounting." If you want people to consider your issues more important, you need to move the issues closer. As summed up in this SSIR article:[2]

It's why some Americans don't get involved in the refugee crisis. It seems so far away and doesn't appear to affect daily life, so they don't engage. If you want to draw attention to something, bring it closer: Show an immediate impact on the person or those they love, or point out how people are talking about it. Make it relevant to life and not an abstract concept. That is why tying pollution to personal health[3] is more effective than talking about parts per million.



> *What frames, if any, exist around your issue? What assumptions are they built on? Are they harmful and you need to change it, or are they helpful and you want to turn up the volume?*

For example, "at-risk youth" defines young people by the struggle they're experiencing, but doesn't shift the focus to the systems that are failing them or to young people's aspirations despite the adversity they may face. Not to mention no teenagers ever think of themselves as "at-risk youth." Or by using the term "returning citizens" instead of "ex-convicts," you can center these individuals as people first and foremost and not as a label they had for a limited time. In these examples, a positive frame can lift up the humanity and other elements of the individuals' being and change how they are treated in the community.

These frames also point to the solutions needed. When we make people the problem, rather than focus on the conditions that have created social problems, we indicate that solutions lie in policing or managing people, rather than fixing policies, environments or systems.

Start by assessing where you are now. Then in Step Three, you can decide what frame you want to use moving forward.

To assess where you are currently positioned and where you should be positioned, know whether you are framing a new conversation, fortifying and amplifying an existing conversation, or reframing a conversation to one that is more productive. This Smart Chart step is about analyzing where you want to be. Later in the Chart, you'll figure out how. For now, put on your analytical hat.

First analyze what the dominant conversation[4] is.

Assess this by reviewing press coverage, the language leaders use when talking about the issue and/or social media posts. Read or listen to those posts and ask: What is the problem that is being communicated? Who is being portrayed as responsible for fixing the problem? To get clear on current positioning, ask or research how those most affected and those with deep knowledge think about the issue. Include in your research those opposed to your viewpoint and how they represent the issue. After you consider all of this information, assess whether there is a dominant frame or several frames. Of those, categorize them as helpful, harmful or neutral.

If there are conversations going on, and sometimes several can be competing for airtime, pick one that is favorable for your efforts and amplify it. If the dominant conversation isn't getting you where you want to go or aligned with the solutions you're proposing, move the conversation to a new conversation with a more helpful frame.

Pro Tip

Be careful about inadvertently reinforcing damaging frames. For years, immigration reform advocates supported The DREAM Act by saying that Dreamers (people who immigrated to the U.S. as children, without documentation) "came to this country by no fault of their own. They didn't break any laws – they were children." That talking point reinforced the idea that their parents did break the law and built momentum for deporting their parents and splitting the family. This frame inadvertently normalized the idea that our system is fair rather than challenging the system itself.

EXTERNAL RESOURCE

One way to avoid reinforcing damaging frames is by advancing asset-based frames. **Asset framing**[5], a concept developed by Trabian Shorters of BMe Community, uplifts communities' strengths (in this case, love, commitment and family) before noting the challenges they're facing. Ask yourself: Does this frame highlight strengths and aspirations, or does it focus on challenges and deficits? If you find that your frame highlights challenges and deficits, consider shifting to a positive frame.

Once you've analyzed what's at play regarding frames, now decide what you need to do moving forward. You have three options. Pick one.

Option 1:

Frame a new conversation. If you are framing an issue for the first time, that means there is no current discussion about the issue. Polling accurately on the issue would be difficult because no one would know what you are talking about and have no context to understand it or comment on it. In fact, the idea is so new you may have to use a metaphor to explain it. There aren't any misperceptions because there is only limited information or knowledge on the issue. Issues for which there is no existing debate are rare.

A new example of framing is around the issue of climate change and the reduction of greenhouse gases in the atmosphere. It's called Net Zero. It means that the amount of carbon added to the atmosphere can be no more than the amount we remove. Explaining, much less understanding, a complicated scientific concept and a possible solution could be mind-numbing to many. One group does it via a bathtub metaphor. You fill a bathtub with water by turning on the taps. You empty the tub by opening the drain. To maintain the amount of water in the tub at the right level, you have to keep the input and output the same. How easy was that?

Option 2:

Fortify and amplify a helpful, values-based frame. Use this when an issue is positioned favorably for you. When people hear it, they start nodding. Turn up the volume. There is no reason to spend resources introducing a new frame. Simply stick with an existing frame that works, and use your communication energy to make it dominant.

For example, consider the issue of canceling student debt. One frame is opportunity and building a strong middle class. Another frame is equity and creating a more level playing field. People agree that the crushing burden that college loans impose on young people will follow them potentially the rest of their lives and is unsustainable. From there, you can make an economic argument or a moral argument or talk about the future among other approaches.

Option 3:

Reframe a losing conversation into a motivating one. If you are losing the debate or the existing frame is so damaging that there is no way to get where you need to go, it's time to switch gears. You may not have a choice. A common mistake is to continue to fortify and amplify a losing debate or a negative frame (meaning a frame that, either intentionally or not, reinforces bad stereotypes and harmful perceptions or supports an oppressive system). For example, some groups believe that one more report, one more fact sheet or a better meme will turn the tide and people will start to embrace their position. That is unlikely. It's important to know when it's time to regroup. You may need (and want) people to think about the issue in a whole new way that can seed the conversation you want and create space for a different, more productive conversation. Rather than continuing to respond to the current debate, choose a new frame and approach the issue from a different direction.

In everyday conversation, we sometimes use "reframe" as a synonym for "let's say this a different way." Remember, reframing is about creating a new entry point for thinking about an issue – maybe not for you and your supporters – but for the decision-maker and your key audiences. It means changing how people previously considered the topic and opening them up to new answers. It is possible, but it may require resources, consensus among many organizations and spokespeople, and patience. Some individuals may be able to reframe an issue more quickly and easily because their sphere of influence is so great. But for most groups, reframing an issue requires a significant commitment to choosing specific, strategic language and sticking to it across messages and between spokespeople.

In the campaign to legalize same-sex marriage, groups leading the fight began with the frame that marriage was a civil right and should be open to LGBTQIA+ people. Through polling and focus groups, they found that this legal argument, while persuasive to many, didn't move enough people, and support for the issue plateaued. To regain momentum and after more research, they reframed their campaign to the values of our shared humanity: love, commitment and family. This new frame, which all groups picked up and reinforced, moved the needle. After all, keeping people apart who love and care for each other was hard to oppose.

No matter which option you take, a number of studies[6] have found that to build support for issues[7], frames must resonate with the values, interests and worldviews of the audience or community in which the frames will be used.

Did you get all that? All right then. Take a short walk over to Smart Chart 4.0. Complete Step Two by filling in your internal and external scans, and analyze how you can be well-positioned to talk about your issue.

Step Three:

Make strategic choices about your audiences and messages

Now it is time to determine your most important audiences, those you need to take action so you can achieve your objective, and write down important information about them. That should include what they care about, on what grounds you are going to appeal to them (e.g., moral, self-interest, pragmatic, economic, etc.), what you are going to say to engage them and who is going to say it.

In some cases, your audience may be the same as your decision-maker. If you have direct access to your decision-maker, ask for a meeting with them. It is most efficient to do this. If, for example, you want local school nutrition directors to serve locally grown organic food and you can go directly to the nutrition directors because you have influence with them, they are your audience and your decision-maker. You should start there rather than spend time and energy activating others to go on your behalf.

If you don't have direct access to the decision-maker, you may need to go through others to reach them. Focus on the audience(s) who have the greatest influence with the decision-maker. In other words, if your objective hinges on a decision-maker with whom you have little access or influence, who is the best audience to help you persuade that decision-maker? Let's think that through now.

Focus on the audience(s) who have the greatest influence with the decision-maker.

Which audiences do you need to motivate?

Priority audiences

When you think of audiences, think about well-defined segments of people. The general public is never an audience. Do not focus on it. If the general public means everyone and you have failed to select anyone, then no one will likely respond to your communications. Few messages appeal to all people. You may need to cast a wide net to get who you want; but you must still segment them to be specific, identifiable and persuadable.

Start with people who have the decision-maker's ear – whom do they listen to, ask for advice from or refer to? Are any of these part of your circle, your community, on your lists and in your sphere of influence? As long as they are influential to the decision-maker, you want to consider them as an audience. If necessary, you can build out from there. Whom do they know, and whom can they engage to take action?

This may be a good time to create a "**power map**" that shows where the people you know have power or influence and with whom and how that trail leads to the decision-maker. If you don't have any connections to your selected audience, how will you reach them? You may need to get a partner. Consider these factors when selecting your audiences (who are not the decision-maker):

- How close are they to the decision-maker? Are they actual influencers?
- Can you reach the audience you want to take action?
- Will they take action on your behalf?

External Resource

According to Gallup, nurses have been ranked as the most trusted profession for close to 20 years in a row. So, during a 2020 "Medicare for All" campaign, National Nurses United – the largest union of registered nurses – came out in support of the program that guarantees health care for every person by speaking at public rallies, posting online and testifying before Congress. It was the trusted messenger and influencer for this issue.

Another thing: The media is rarely a priority audience. Media outreach is generally a way to reach an audience – a tactic or communication activity you use to reach your audiences. The exception is if you have an objective where you need to change editorial policy at a media outlet. For most objectives, you can include media outreach activities in Step Four.

Think in segments. Who are the people who can move your decision-maker and help you achieve your objective? The more clearly you define your audience, the more strategic you can be about engaging that audience. There are different things to consider when analyzing your priority audiences.

You can segment your audiences by demographics (e.g., race, age, gender identity or expression, ethnicity, income, language, etc.), geography (where they live, work, learn or play), psychographics (people's beliefs, attitudes, opinions and behaviors) and other categories relevant to your work. Examples of well-defined audiences include: Black, Indigenous and People of Color (BIPOC) college students who have recently transferred schools, suburban moms who are in a specific income range and take their families to state parks, businesspeople who travel

Pro Tip

Sometimes you first need to build an audience's credibility with a decision-maker before you activate it to engage with the decision-maker. This can be part of your strategy: to credential and then activate an audience.

SPITFIRE TOOL

frequently to major U.S. cities, millennials committed to racial and economic justice who shop for clothing online, or family farmers in the Midwest engaged in sustainable organic practices. The key is to segment your audiences into distinct categories and group them based on their values and priorities. Note that psychographics are more important than demographics when it comes to knowing how to persuade people. If several segments have the same values and you can approach them in a common way, it's convenient; but don't dilute your communication to try to appeal to everyone, because by going after the lowest common denominator, you are taking the power out of your communications.

For more information on ways to understand people's beliefs, attitudes and opinions, see **Spitfire's Mindful Messaging™** report at mindfulmessaging.spitfirestrategies.com.

EXTERNAL RESOURCE

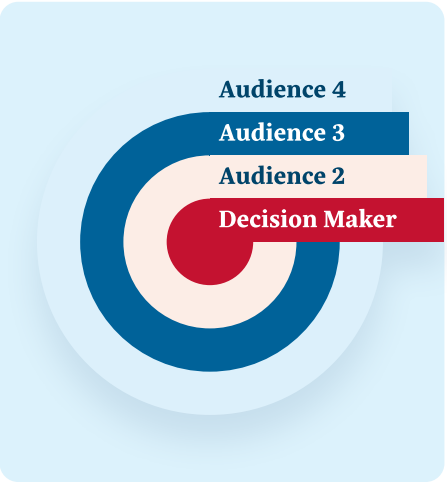
How you reach each audience will be different based on a variety of factors, such as their interests, where they get their information (and what channels are best to reach them) and who they listen to about issues they care about (we'll consider these "credible messengers" a little later). You can have several priority audiences, but you may have to develop a different strategy to reach each one. Don't forget to look at each audience's context. What does the audience currently know and think about your issue? What events are happening in the news that may impact how it receives information from you? Even consider the emotional or personal approach that may be necessary when creating messaging and other communication activities.

SCIENCE SAYS

Science Says: "I'm thinking about how you are feeling."
People's brains are often irrational. Approaching communications as if our brains are rational and lead with facts over emotion means you'll miss opportunities to connect with and motivate your audiences. Check out how different people behave and how to encourage them to think and act the way you want. **This list of behavioral economics concepts (time-inconsistent preferences, bounded rationality, status quo bias, framing effects, availability heuristic, and social norms)**[8] offers examples of psychological insights you may encounter. Some help you, and some make your communications more challenging. Knowing what you have to work with will help you create strategies that will work.

You'll note that the Smart Chart 4.0 worksheet has three columns for priority audiences. You may have more or fewer audiences than that. Don't be constrained by the chart. You can also center your decision-maker on a piece of paper and then place the audience that has the most influence on the decision-maker closest to the decision-maker and continue outward with

sequential audiences. Decide how many audiences you need to analyze and move. Keep in mind that the more audiences you want to reach, the more resources you may need. Refer back to your internal and external scan to make sure you can do this well.



Something else to keep in mind: Your audience may be smaller than you think. When it comes to moving an issue, there is no defined number of voices that will guarantee victory. Depending on the objective and your strategy, you may need masses of people to turn out. However, the number of people needed to make change is not necessarily as many as possible. Small numbers can make big things happen. Your job is to figure out how many you need to engage to get the job done. That is the most efficient way to plan. The smaller the audience, the easier it is to create a focused communication plan that will move the audience to action. That being said, sometimes small groups are still hard to move and require sophisticated effort.

Selecting audiences that are likely to inspire others to get involved is an effective way to communicate with a small number of people but end up with large numbers of supporters. It is also important to select audiences that are willing to show public support. Public proclamations such as identifying as a feminist, sporting bumper stickers, wearing lapel pins and posting on social media build the perception of broad support and, in turn, attract others to join.

Will your audience do what you want it to do? It is important to never waste time convincing those who are never going to take the action you want. People can often be classified in three ways: the gots, the gettables and the never gonnas. The gots are those who are with you all the way, the gettables are on the fence and may be persuadable, and the never gonnas are against you and will never be with you. Feed the ones who are with you. Let them know what you are doing, and make sure they are ready to move. But make sure all your efforts aren't on the gots, because you already have them. Focus even more on those you can persuade, and forget the ones who will never come over to your side. Too many organizations are seduced into working on the never gonnas instead of concentrating on an audience that may be undecided and could be swayed by thoughtful outreach.

> **It is important to never waste time convincing those who are never going to take the action you want.**

Pro Tip

Do an audit of your outreach in the last month on this topic. Which audiences did you engage with? If you are doing mostly preaching to the choir but your objective is to expand support, rebalance. If a lot is going to never gonnas, stop. Spend that energy on gettables.

Are your audiences ready to act?

Readiness

Where is your audience when it comes to your issue: beginner or advanced? The most effective messages are designed to meet your audience where they are – in knowledge, beliefs, behavior and experience – and move them toward your point of view and the action you want them to take. Think about communication in three stages: Sharing Knowledge, Building Will and Reinforcing Action. Sometimes moving through these stages happens quickly. Sometimes it takes a decade or more.

Stage 1:

Sharing Knowledge. In this stage, your audience is still getting its mind around the issue or idea. The audience members may not know much about it, so your task is to share information about the issue without overwhelming them. People in this stage of readiness need to **know, care and believe.** They need to know enough to get interested and excited before they can consider acting. They need to understand what it has to do with their life. You can make the issue relevant to them by appealing to their values, beliefs and behaviors or by connecting them to the issue personally. And you need them to believe what you are telling them: Climate change is real; systemic racism is here.

You can't have two out of three. For example, when encouraging people to save money for retirement: People know they need to save for later in life. They may already *care* – at some point everyone wants to retire without worry. But they may not believe saving is possible with their current salary and financial commitments. So, they don't save. You are stuck in Stage 1 until they know, care *and* believe.

To get people to care, make it personal. Here are four ways to do that:

Personal relevance:

It affects the audience directly (e.g., if you are female, you are likely to pay more for a car because of bias.).

Personal connection:

You can quickly connect the issue to something or someone they care about. If a friend or family member pays more for a car than they should have, we are more likely to pay attention to the issue of commercial bias because it happened to someone we know.

Personal reward:

They get something tangible or intangible when they take action. Did you know giving money to a cause you care about releases dopamine?

Personal experience:

If you can offer them a chance to live the issue through one-on-one interaction, it creates a personal, emotional connection. This can be through storytelling, personal testimony or a simulation.

> *"For example, seeing a movie or television program[9] will make people feel like they experienced what the main characters are experiencing directly.*

Stage 2:

Building Will. Lots of issues have people who know, care and believe but get no action. When that happens, it's time to stop sharing information and switch to motivating them to act. The key is to discover their barrier(s) to action.

Your messaging needs to shift to minimize or overcome the barrier. That may take some research on your part – online, through focus groups and surveys, or simply by talking to the audiences so you understand what's holding them back. Is it a lack of time to do what you're asking? Does the action seem too hard or outside their experience? Do they lack agency and think they can't make a difference? There may be more than one.

EXAMPLE

During the 2020 U.S. census, even after the Supreme Court rejected the inclusion of a question about citizenship status, many immigrant communities, both documented and undocumented, were hesitant to participate due to perceived risks to safety and possible deportation. Many communities of color were also hesitant to participate because of justified distrust in how the government would use their data. Census Counts and a number of civil rights groups, as well as high-profile political and cultural leaders, conducted a coordinated campaign to educate people about the census and to encourage and demystify participation. The Census Bureau released an advertising campaign emphasizing that participants' information would not be shared with local or federal authorities and would be used to improve their lives.

CENSUS COUNTS 2020

You can overcome barriers by making it seem less risky, respecting the audience's comfort zone and asking them to take a manageable action that is possible with their abilities. Try showing your audience someone they respect taking the action, or position the action as a social norm among their peers. In all of these, offer hope for positive change and show how the benefits of taking action outweigh the risks, real or perceived.

EXTERNAL RESOURCE

It is important to know the difference between hope and optimism. Jaqueline Mattis says that hopeful people "do not wish, they imagine and act." **She offers five steps to cultivate hope.**[10]

SCIENCE SAYS

Science Says: "I'm Gonna Need You to Slow Down and Take a Breath."
Some behavior changes require audiences to practice slow thinking. That means overcoming a desire for fast decisions and short-term results and helping audiences to slow down. Daniel Kahneman, who won the Nobel Prize for his work on behavioral economics, makes this case[11] around people who get tired of the practices required to defeat a global pandemic. People learn to live with the pandemic. Their sense of risk goes down so they don't wear masks, they take unnecessary trips, and they disregard social distancing. They make fast decisions

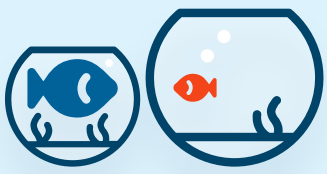
SPITFIRE TOOL

based on rewards that are immediate like not breathing through fabric and seeing friends. The benefits of doing the right thing are invisible. If this sounds familiar, you'll need to devise communication strategies and messages that get people to stop, think and then act. One of the best ways to get people to think more slowly is to make one of your messages a question. Isn't that interesting?

For more information on ways to identify and overcome barriers, **see Spitfire's "Discovering the Activation Point™" report at www.activationpoint.org**.

Pro Tip

Each selected audience is in one stage of readiness. That is the importance of segmenting. If you find an audience in two states of readiness, then you have two segments. Separate them, because you will need to communicate with them in different ways. For example, if you are organizing apartment building tenants to fight eviction notices and some occupants are new and don't know about the meetings and some are current tenants who know about the meetings but don't attend, you are sharing knowledge with the new tenants and building will with the current tenants. And, of course, with the tenants who have been coming to the meetings, you are reinforcing action.



Stage 3:

Reinforcing Action. Once members of your audience take action, even minimal action, praise and thank them sincerely. Let them know how their action made a difference on the issue. Put a warm spotlight on them. It doesn't have to be a huge impact – just a meaningful one.

They should feel positive for taking that action: pride, awe, satisfaction and a desire to do more. Reinforcing action isn't a one-time thing. You can keep doing it. Proponents of the Affordable Care Act remind us over and over how many people are covered, how many young people don't lose coverage before finding their footing in a job and that those with preexisting conditions have reasonably priced coverage.

What do your audiences care about?

Core values and concerns

People have different values and worldviews that influence how they see problems and solutions. Values are what we care about, prioritize and believe to be important. A worldview is our personal belief system that tells us what we think to be true about life and, well, the world. Whether a person sees the world as a place of abundance or a place of scarcity is a worldview. How they will consider problems and solutions is greatly impacted by this worldview. Knowing what your audience cares about will let you engage with them more effectively. Yet, often when we try to build support for the issues we care about, Matthew Feinberg and Robb Willer have shown[12] that we tend to lead with our own beliefs rather than the values and worldview of the people we are communicating with.

As you think about your issue from your audience's perspective, determine where they are and what will move them toward taking action. People respond more positively to an issue when it's presented in a way that aligns with their values and shows respect for their knowledge, beliefs and experiences. You may want to change people's values, to help them think about something in a new way. It's possible, and it may take time; but it is always easier to tap into a value someone already holds than to change their current mindset.

Sometimes the value you identify is big, like "justice for all" or "the system is rigged against people with low incomes." And sometimes the thing that people care about most may be something like feeling good about themselves. Your audience's core concerns may not seem like big values in relation to your issue, but they are everything to your audience.

Just as important as the value is the core concern that may keep the audience for taking action. You know what audience members care about, but why might they say no to you? Identify the barriers that go along with what they care about. As mentioned in Stage 2 (Building Will), you must also anticipate what concern may prevent your audience from engaging. People have many reasons for not taking action. To motivate people, you must anticipate and overcome those barriers.

When it comes to deciding which values to tap and which core concerns to address in your messaging, make sure you are clear where your audience sits through research that gives you this insight. You cannot assume that if people know what you know, they will do what you do.

Science Says: "But, What Happens if …?"

Studies[13] show that people often place a higher priority on what they might lose rather than what they may gain. This is called loss aversion. You can't assume that asking for someone to invest in something now because they will save money in five years will automatically work because they will feel the loss of the money right now. We see this play out in health care reform, where some get focused on potentially losing the chance to go to their specific doctor even if the overall care they are going to get will be better. It is often the underlying argument for why we can't switch from fossil fuels to renewables because we will "lose jobs." If loss aversion is at play with your audiences, you'll need to find a way to minimize the loss or get them to feel the loss less acutely so they are open to a change.

> **People respond more positively to an issue when it's presented in a way that aligns with their values and shows respect for their knowledge, beliefs and experiences.**

Science Says. "What Value Is More Valuable?"

People have competing values, and your job is to consider which values are most motivating on your issue. Consider the values your audience holds, and think about the order in which they may hold these values. A study[14] around food found that people prioritize taste over health. Surprised? Encouraging healthier eating by using nutritional information was not nearly as motivating as talking about healthy foods tasting good. So if you want to get people to eat their vegetables, use messaging that features the deliciousness of those green leafy things.

Many people know that big cars have high emissions levels, but they choose to drive them anyway. Don't assume they don't care about the environment. They may have other priorities that are more motivating than concerns for the air. Perhaps big cars make them feel safer. Perhaps smaller cars do not offer enough cargo or passenger space. If you want to connect with your audiences and make them active supporters to reduce emissions, you need to understand how they think and why. You may want to get people to reprioritize their values and see things in a new and different way. First you need to understand how they see it now.

There are all different types of barriers. People may not believe that what you say is a problem really is. They may not believe that your solution will work, or they may not like where your solution is implemented (known as solution aversion). You need to be clear-eyed about what you are up against and start to think about how to get around it.

> *Remember: This issue is about their value system, not yours. It is about the things they care about – not what you care about, what you think they should care about, what you want them to care about or what you assume they care about.*

Deeper Dive: Values

Researchers have surveyed thousands of people around the world to measure what is morally important to them and have identified five values that guide intuition: care, fairness, in-group loyalty, respect for authority and purity. People who are liberal tend to value care and fairness. Graham and Haidt (2012)[15] determined that people who are conservative tend to value respect for authority, in-group loyalty and purity/sacrednes.

For example, Feinberg and Willer (2013)[16] assessed whether message frames with values of harm/care and purity/sanctity were effective in shifting conservative beliefs toward climate change. Participants in their study read an article modeled after a newspaper op-ed. With one group reading a harm/care message that "described the harm and destruction humans are causing to the environment and emphasized how important it is for people to care about and protect the environment." Another group read a purity/sanctity message that described "how polluted and contaminated the environment has become and how important it is for people to clean and purify the environment." Three images were included with the messages:

"The purity/sanctity pictures showed a cloud of pollution looming over a city, a person drinking contaminated water and a forest covered in garbage. The fairness/care pictures showed a destroyed forest of tree stumps, a barren coral reef, and cracked land suffering from drought. Importantly, both messages ended positively, providing information regarding what people can do to improve the environment."

The researchers then measured how important participants felt it was to protect the environment, how likely they were to support government legislation to protect the environment and to what extent they thought people were the cause of global warming. For people who were more conservative, messages that framed climate change using purity/sanctity values were more likely to alter this audience's beliefs about climate change and support legislation curbing it.

Consider these two good examples. First, your issue may be hard to think about. People avoid information if it makes them feel bad, obligates them to do something they do not want to do or challenges their deeply held beliefs. For example, studies[23] have shown that people will go out of their way to avoid relevant health information (like whether they have a sexually transmitted disease or are at risk for other health issues) if it would make them feel bad or anxious or require them to follow up with actions they would rather avoid. If this is what you are up against, your messaging needs to either make audiences think this is less of a big deal or give a compelling reason to face hard truths.

Second, a barrier may include implicit bias. Research confirms[18] that people hold unconscious biases toward others and that those influence how they interact and may result in racist, sexist or other discriminatory behavior. For example, studies have shown[19] that because of implicit bias, Black patients get different care than white ones. Research also shows[20] that just telling health care professionals this doesn't change the way they act. Even training on implicit bias can lead to people thinking bias "just is" and that they can't change it. If this is the barrier you are facing, you'll need to think about what messaging you can give health care providers that makes them see that bias is happening, that it has a negative effect on patients and that they have a role in changing it so they don't assume it can't change.

If you've identified multiple barriers that may prevent your audience from engaging, choose the one that is most important to overcome – the "deal breaker."

Your audiences may have more than one value and more than one barrier. Write them all down. Once you've made your list, review your objective and priority audiences, as well as your internal and external scans. Based on what will be most motivating to your audience and what you can legitimately link to your issue, choose the most appropriate value to tap into and the top barrier you'll need to overcome. Analyze your choice. If it seems unrealistic, rethink your decision. If you've identified multiple barriers that may prevent your audience from engaging, choose the one that is most important to overcome – the "deal breaker."

How will you motivate your audiences?

Frames, narratives and messages that motivate

Framing, narrative and messaging are all strategic decisions. Before you write your talking points, you need to decide what is at the heart of the messaging and how it will motivate the audiences you want to move. This is where you'll

put into action the frame analysis you did in Step Two and decide what your frame will be. This defines the conversation you want to have with your audiences. You also need to choose the narrative that will reinforce the frame. Make your frame and narrative decisions in ways that are honest, authentic and sincere to you and your group.

Let's walk through each of these three strategic decisions.

Framing. As we've discussed in Step Two, frames set the basic way we think, talk and feel about an issue. In many ways, they define what an issue means and what assumptions we carry. The use of a frame can be either a deliberate or an unconscious choice that establishes what's highlighted and what's cut out of the picture you're painting in your audience's mind. You want to be deliberate, so take your time here to make good strategic choices.

Pro Tip

Want to learn more about framing and narrative, here is a great library of resources[22]

Narrative. According to the Narrative Initiative[21], a narrative "reflects a shared interpretation of how the world works." It is a collection of stories and beliefs, repeated and strengthened over time, that helps us make sense of the world – why things are the way they are, what's possible and what's not. There are often multiple narratives around an issue, but usually one stands out above the others. Those dominant narratives often ring true to us and are "just common sense," whether they're true or not. "Work hard and you'll succeed!" is one commanding narrative you've likely heard. For many, that sounds right, but others will think, "Really?" Dominant narratives are dominant for a reason. They are supported and reinforced (consciously or not) by those who hold power in a society. When writing your messaging, think about which narratives are most helpful for you, and avoid reinforcing those that are harmful. Color Of Change tackles this in **Changing Our Narrative About Narrative**[23].

EXTERNAL RESOURCE

Messaging. This is the way you bring your chosen frame and narrative to life when communicating with your audiences. A solid message will reinforce your chosen frame and narrative while connecting with the values of the people you want to motivate.

> **A solid message will reinforce your chosen frame and narrative while connecting with the values of the people you want to motivate.**

Look at the recent Stop Hate for Profit campaign backed by groups like Color of Change, the NAACP and National Hispanic Media Coalition, which shows frame, narrative and messaging aligned and working to inspire action. The frame is in the name of the campaign. It gets people to focus on Facebook's policies through the lens of selling hate for profit. A Politico story reported the narrative:[24] "Facebook was a petri dish for racism and discrimination; it was growing hate. And, by taking a largely hands-off approach, Facebook wasn't

taking the issue seriously." The campaign messaging reinforces the frame and the narrative. Here's its sample copy for social media: "From ugly racism to dangerous QAnon conspiracies to indefensible Holocaust denial, hatred has taken root and spread across Facebook. For years, they have looked the other way. Enough is enough. Tell Facebook to #StopHateForProfit."

Take a moment to revisit the frame decision you made in Step Two. It will come in handy as we move to understanding narratives and putting it all together in messaging. You may find that you have different framing options that will resonate with your audiences. Take a look at this example:

For anti-smoking efforts, if the objective is to prevent or reduce smoking among young people, there are several frames that are already moving. Those give advocates different options to choose from when considering which frame to boost. Option 1: Some young people are worried about their health. Option 2: Many young people are worried about how they look. Option 3: Young people don't like being lied to. All three are frames already moving and are based on values young people hold. Now the anti-smoking group needs to determine which of these to use for its communications with young people.

Pro Tip

As you consider framing, narrative and messaging, be wary of status quo thinking and conventional wisdom. It is sometimes discriminatory thinking and may reinforce systemic bias, negative stereotypes and oppression.

Anti-smoking advocates picked option 3. They wanted to lean into a frame that reinforced the idea that young people don't want to be manipulated, and this campaign could reinforce that through the narrative that this is exactly what Big Tobacco was doing. The campaign drew the curtain back on Big Tobacco's predatory practices as a way to say to young people, "Don't fall for this."

Picking a frame, evoking an intentional narrative and bringing it to life via smart messaging means making a few decisions. First, decide what the main point of your conversation is. For anti-smoking, it was knowing the "truth." Second, decide which emotion you want to generate. In the anti-tobacco case, the campaign wanted to provoke outrage from young people that giant corporations are trying to manipulate them. That took advantage of anti-corporate narratives around independent choice and individual freedom. The campaign knew from audience research that young people do not want corporations to make decisions for them. In a broader sense, the anti-smoking advocates naming Big Tobacco as the villain of the message taps into, and furthers, narratives around the ills of corporate power.

Along with frame and narrative, when writing messages, consider the power of emotion. It raises the stakes, grabs people's attention, focuses their concern and moves them to action. An optimistic tone can help empower and motivate your audience to engage with your organization. A righteous anger may energize and galvanize supporters. A humorous approach may reduce anxiety, take the air out of pompous authority figures, cut them down to size and entertain your audiences to boot.

> **People make decisions based on emotions more than facts. That means choosing the right emotion for your communication is a strategic decision.**

Science Says: "So Many Feelings!"

People make decisions based on emotions more than facts[25]. That means choosing the right emotion for your communication is a strategic decision. And guess what? Fear and shame seldom are the best emotions to tap. That's good to know because there are lots to choose from. Explore all the emotions possible[26] and pick the one that might motivate your audiences most effectively. Take some risks. Caty Borum Chattoo[27] encourages people to be "funny and deviant, not dark and pessimistic." She has evidence to back this up. Shankar Vedantam reminds us that overemphasizing certain emotions like outrage may backfire, as this Hidden Brain episode[28] notes.

SCIENCE SAYS

One last thing: See whether you can communicate in a way that increases the sense that people can make a change and that they'll get a reward (something they want) if they act. For the anti-smoking messaging, it is clear that you can guard yourself by knowing what's really going on (you have the power to do this) and you don't have to feel conned by a big company making a buck off of you (reward).

Time to show your messaging brilliance:

- **Identify the frame you want to evoke.**
- **Sum up the narrative that will bring the frame to life.**
- **Identify the emotion you will elicit in audiences that will motivate them.**

The message box

OK, so now you know the audience you want to reach, how you may persuade them, and what frame and narrative you need to bring to life, along with the emotion you want to evoke. Next, you need to get this across in a way that is memorable.

You want to tap into your audience's value system and how it connects to your own. This is a good time to review your external scan to see what misperceptions you may want to address or information you want to reinforce.

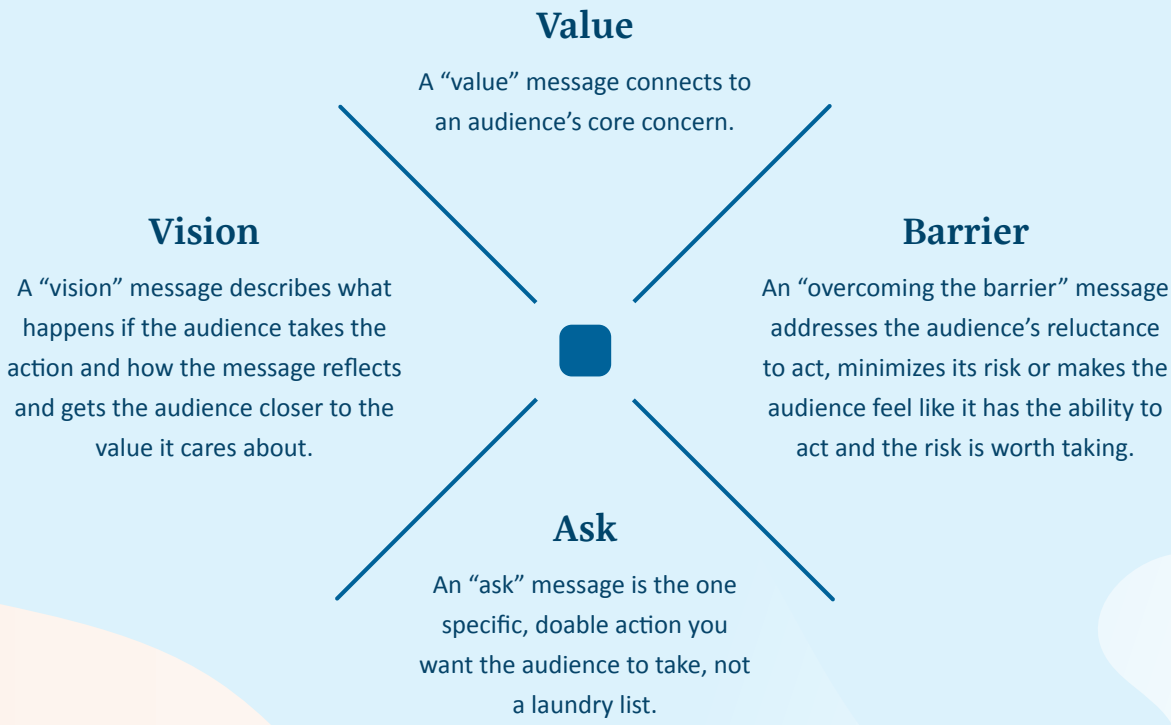
When it comes to framing, are you talking about something that is absolutely brand-spanking new, amplifying something that exists, or reframing or changing the way people think about your issue?

You also need to be in the right stage of readiness for the audience. That is either Sharing Knowledge or Building Will. Review the persuasion points you identified earlier: what the audience cares about and how you will connect to it; and what the audience's barrier is and how will you address it. Keep in mind these words of wisdom: "It's not what you want to tell them – it's what they are willing to hear." Always think about what will motivate the audience.

There are four main parts to your messaging. You can create these and use them in any order. They are not linear. Within these four sections, you can make a compelling case for why the audience you are engaging should take action:

- A "value" message connects to an audience's core concern.
- An "overcoming the barrier" message addresses the audience's reluctance to act, minimizes its risk or makes the audience feel like it has the ability to act and the risk is worth taking.
- An "ask" message is the one specific, doable action you want the audience to take, not a laundry list.
- A "vision" message describes what happens if the audience takes the action and how the message reflects and gets the audience closer to the value it cares about.

For the "value" message, write a statement or question that will have your audience nodding in agreement. You identified its core concern and value in the beginning of this section. What was that again? Take another look.



Next is the "overcoming the barrier" message. This is where your response addresses the audience's resistance or hesitancy to your objective without repeating the audience's barrier. (Yes, you've already named the barrier too.) Never repeat the barrier. It just reinforces the audience's objection and drives it deeper into the audience's brain. So, instead of saying "I know you think this program is too expensive but …," try: "With this program in place, we will increase economic growth as well as save money on these three things." Overcome without repeating. Pretty smart, right?

In the "ask" message, write down the one specific action you want your audience to take. Make sure it is something the audience can actually do and, hopefully, something you can tell whether the audience did. Be very clear with your ask. "Learn about this important issue" or "support our project" are so broad and generic that no one knows what you want or what they are supposed to do. Tell them!

For the vision message, show your audience members what happens if they take action. This is the "so what." The vision and the value message mirror each other and must share the same concern. If your audience takes action, you and the audience get closer to the value you both care about. For example, if your audience's value is accessible, affordable, healthy food in the neighborhood, then the vision must show how the ask takes the audience there. You can't start with a healthy food value and end with a vision of reduced spending on health care. Both are good; but they are different values and visions, and they belong in different message boxes.

> **Never repeat the barrier. It just reinforces the audience's objection and drives it deeper into the audience's brain.**

Science Says:
"Let Me Ask You Something."

SCIENCE SAYS

If we want to get people to open their minds, we need to ask questions – and listen to answers. We need to ask honest questions that demonstrate that we really want to know. Debating can actually harden people into their positions instead of considering new perspectives. We can take a page from the process of motivational interviewing to engage audiences in finding what will motivate them to change. In the article where Adam Grant[29] explains this, he shows how the power of shifting a question from "why not" to "how" opens up conversations. And from there, change may be possible.

Another opportunity to change someone's mind comes from a study of screenwriters in Hollywood[30]. Hard pitches of stories to studio executives were more likely to fail if they were presented as a finished idea. Screenwriters had more success getting scripts approved when they presented a more malleable concept that allowed the decisionmaker to add their input and suggestions.

Thinking About Frame, Narrative and Message. Within the same issue, different frames, narratives and messages can be at play. You can choose the one that will work best for your audience and its value or core concern. Take a look.

To encourage and sometimes require mask wearing while in public spaces during the COVID-19 pandemic, many individuals and companies created their own messaging that showed up as signs, posters or emails to their customers, clients and patrons. For some people, wearing masks is a polarizing subject, so the messaging often reflects this sensitivity, and different frames and messages show up. Here are some examples.

Frame: Interconnected.

Narrative: Your decisions affect me and vice versa.

Messaging: "I wear my mask for you. Will you wear one for me?"

Frame: Local pride.

Narrative: Real New Yorkers wear masks.

Messaging: "NY Strong. NY Safe. Wear Your Mask."

Frame: Stay open.

Narrative: It is up to us to keep our favorite places open.

Messaging: "Don't be the reason to end our season." (posted at Bridger Bowl Ski Area)

Once you have set the audience's perspective on an issue (frame), you can link this perspective to a larger truth or idea (narrative) and then engage the audience through their values (messaging). Use these three communication elements to bring your messaging to life.

See how that works? In each of these cases, the frame taps a value the audience has and attempts to overcome barriers that may inhibit mask wearing. The messaging is short, to the point and clear about the ask.

To test whether your message is the best it can be, ask the following questions:

- ☐ Is your message based on the audience's core concerns?
- ☐ Is the messaging consistent with the frame and narrative you've decided on?
- ☐ Does it overcome – not reinforce – the audience's barrier?
- ☐ Is the ask in the audience's comfort zone? If not, do you have a benefit that will outweigh the risk?
- ☐ Does the message offer a vision that reflects the value message?
- ☐ Does it convey hope toward success?
- ☐ Is your messaging clear, compelling, concise and repeatable?
- ☐ Does it create a clear narrative that is understandable?
- ☐ Can you use a story to tell each message point?
- ☐ Is the messaging personal to the priority audience you want to reach?

Dazzle your friends and colleagues with your message box.

Deeper Dive: Messaging mistakes to avoid

- Don't use acronyms or jargon. They make messages confusing and dry. Use plain language that is easily understandable and clear. If people don't understand, they don't ask questions – they tune out.
- A message is not a reworded mission statement. Keep it conversational and specific.
- Don't include too much info. Keep the messages short, easy to remember and easy to use. Where you can, use the concept of "social math," which takes statistics and big numbers and puts them into a context that is relatable to your audience. Most audiences may have never seen 100,000 children, but if you say that that number is more than twice the number of people that can fill Yankee Stadium, your audience now will have an understandable point of reference and say, "Wow. That's a lot of kids."
- Make each message one sentence that is memorable and repeatable, not a paragraph. You can support each one with additional facts, statistics, anecdotes and stories.
- Respectfully represent the communities you're describing. Drop the "vulnerable communities," "at-risk youth" and other social science, deficit-based jargon. Use language that communities use to describe themselves.
- Investigate your terms, and then eliminate negative stereotypes and harmful narratives.
- Use "people-first" language. That puts the person before their diagnosis, disability or circumstance – such as "people experiencing homelessness" rather than "homeless people."

Which messengers work for your audiences?

The messenger

Research tells us that the people who deliver your messages are just as important as the actual messages. The right message delivered by someone with no credibility with your audience will be ineffective or ignored. Decide whether you need a peer-to-peer messenger (e.g., school teacher to school teacher), a community member who is known and respected (e.g., religious leader, community organizer, business owner), a leader who is known for their expertise in the issue area (e.g., nurse, scientist), a member of your staff or coalition, or someone completely different.

To select an appropriate messenger, consider the following:

- If possible, they should be part of the audiences' in-group, because people turn to in-group members as a mental shortcut to form beliefs. In other words, to increase trust, messengers should share a social identity with the audience or community you are communicating with.
- Certain people have outsized influence. Different groups have different people they turn to for information and norms. When building message campaigns, identify whom the audience likes, trusts and spends time with, and recruit those individuals to share your messages.

> *"Here's a crucial point: Messengers have to walk the walk. When you identify messengers, ensure they not only believe in the values and actions associated with the cause but live them.*

Got it? Go to Smart Chart 4.0 and show your brilliance. Complete Step Three by filling in each of your strategic decisions.

Deeper Dive: Messengers

Peer to Peer: Research by social psychologist Samuel Gaertner and his colleagues (1996)[31] suggested that people are more likely to believe others in their group – people who are like them. You may select messengers who are part of your audiences' in-groups or perceived to be peers or who can change your audiences' minds about who is part of their in-group.

Credibility: Research by communications scholars Miriam Metzger and her colleagues (2010)[32] used focus groups to examine assumptions about information credibility. They found that people make judgements quickly and often rely on others they trust to decide whether information is believable. Consider factors such as reputation, recognizability and credibility when choosing a messenger.

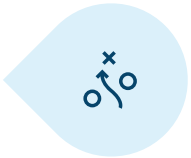
Influence: Social psychologist Elizabeth Paluck and her colleagues (2016)[33] wanted to see whether they could reduce bullying at 56 middle schools by working with school influencers to share anti-conflict new behavior norms. Students were asked whom among their student peers they most enjoyed spending time with. Because these students were already well-liked, their behaviors and messages transmitted through the schools quickly, reducing bullying by 30% at the treatment schools. Consider a messenger's likeability and social networks to normalize new ideas and behaviors.

Step Four:

High impact activities to reach audiences with messages

In this section, your communication strategy starts coming together as you identify high-impact activities and decide when you need to do them, how to execute them and by whom.

How will you engage your audiences?



Tactics: Communications activities (tactics) are the ways you deliver your messaging to your audiences. Tactics can include meetings, websites, street theater, social media posts, newsletters, videos, storytelling events, press conferences, rallies, letters to the editor, phone calls, paid advertising or other ways of getting your message out there. The more creative the better to cut through the noise people are bombarded with.

Once you've made all the strategic communication decisions, choose the communications tactics that you think will work best and have the highest impact. Those tactics should reflect and flow logically from the decisions you have made in your objective, internal and external scans, audiences and messaging, and they should match the approach and tone you've chosen for your communication.

- ☐ meetings
- ☐ websites
- ☐ street theater
- ☐ social media posts
- ☐ newsletters
- ☐ videos
- ☐ storytelling events
- ☐ press conferences
- ☐ rallies
- ☐ letters to the editor
- ☐ phone calls
- ☐ paid advertising

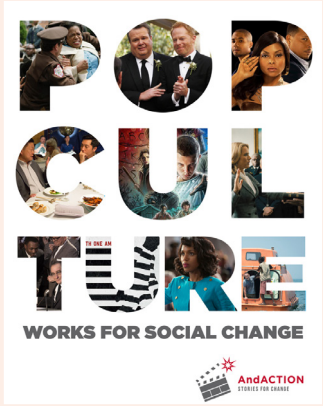
The best communication efforts use the most direct tactics. For example, to reach an internal audience like your current supporters, you may use a simple newsletter or email instead of a full-scale advertising campaign. Remember to choose the tactics that are most appropriate for the audience you have selected. Your audience research should tell you where the individuals get their information and how. For example, some social media platforms are more popular with specific types of users. Certain media outlets[34] appeal to and reach particular demographic and cultural groups and people with distinct interests.

> **Once you've made all the strategic communication decisions, choose the communications tactics that you think will work best and have the highest impact.**

With your tactics, you want people to remember your information, act on it and share it with others. There are lots of reasons why information sticks with people. Research tells us[35] that people are much more likely to remember information when it is in a story. When information is repeated, studies show[36] people believe it to be true; and when we include emotions like surprise, anger or disgust, individuals are[37] more likely to share the information. It's just human nature[38].

People are also more likely to hear your messaging[39] if it provides some useful information that will help them, keeps them in good standing with their social groups and connects them to their sense of identity. We know that people[40] are also more likely to seek out information that reflects how they already see the world. Be careful, though. Studies demonstrate[41] that selective exposure and confirmation bias – a tendency to accept only information that validates how people already see the world – pose a challenge to ideas that may be new or counterintuitive to an audience.

Communicating information **through entertainment in popular culture** may be one of the best ways to break through politicized information sources and help people care and remember information. For example, studies have found[42] that films like "The Day After Tomorrow," "Inconvenient Truth" and "Standup Planet" increase interest and action on environmental issues. Consider how your messaging may tap into that connection.



SPITFIRE TOOL

Science Says: "Is That Like First Impressions?"

People use shortcuts[43] to quickly decide what they think about something. Knowing what those shortcuts are can be useful. As Lisa Feldman Barrett explains, "Your brain is drawing on your deep backlog of experience and memory, constructing what it believes to be your reality, cross-referencing it with incoming sense data from your heart, lungs, metabolism, immune system, as well as the surrounding world, and adjusting as needed."

SCIENCE SAYS

In other words, through a process that even Barrett admits "defies common sense." A university discovered how this works the hard way. Drake University spent a lot of time and money to develop a communications campaign to say why people should attend Drake. The campaign featured D+50 as how to encapsulate the Drake experience. In an academic environment, D+ already has a well-established meaning in most people's minds. (Hmmm, what could that be?) Connecting D+ to Drake did the opposite of what the university set out to do.

Above all, the tactics should be realistic. Better to have a handful of smart, well-executed activities than to overextend yourself and end up with many tactics but little impact.

And when?

Timing: Now that you've determined the activities in your communication strategy, begin to plot the timing. Start walking back from the timing of the objective and figure out what needs to happen when. Look at your internal and external scans to see whether there are any dates or activities you can piggyback on or need to avoid. Not everything can happen at once, so be careful about how you space out the activities you need to get done. It may be helpful to create and maintain an "opportunity calendar," which sets out upcoming events, dates and other occasions that you can take advantage of to deliver your messages, draw attention to your issues and energize your supporters.

Be sure to note natural and ongoing communication opportunities such as holidays, legislative sessions or awareness events like Women's History Month. We call this "guaranteed timing." Some guaranteed timing may be related to the flow of a person's life, like when they go shopping, when they are thinking about the start of school or as their needs and identity change when having a child.

> **And be realistic: You can't communicate with your audiences 24/7.**

Also, think about "invented timing" – opportunities you can create through special events such as awareness days, weeks or months; earned media; and other activities. And plan ahead for "unexpected timing." Sometimes events beyond your control can present a chance to connect with your audiences. You want to be ready to move when they do, so think about those in advance.

#GivingTuesdayNow, a GivingTuesday.org project, mobilized millions of people to give and take action on May 5, 2020, in an emergency response to the COVID-19 pandemic. This was in addition to the annual GivingTuesday right after Black Friday in November. The organization didn't wait for its annual event when it saw an immediate need to act. Think about what may pop in the news or in popular culture that has a connection to your cause. How could you take advantage of the attention that people are paying to it?

GIVING TUESDAY

EXAMPLE

And be realistic: You can't communicate with your audiences 24/7. Your organization probably can't sustain it, and you run the risk of losing support when your audience gets tired of hearing from you.

Consider other organizational commitments such as board meetings and big fundraisers to ensure your communication effort gets the attention and focus it needs. Make sure communication is on the agenda. Begin to integrate your communication strategy into the organization's overall work plan.

Who does what?

Assignments: The biggest step toward putting your strategy into action is to assign key tasks to the people who will help you. Identify the staff, volunteers, coalition partners and other players who will take part in your communication operation, and put their names next to the activity they are responsible for. If you don't have staff to assign or if you are overwhelming someone with more than they can take on, the tactic is unlikely to get done. Reconsider the activities you are prioritizing.

How much, and how long will It take?

Budget: Staff time and money are necessary but finite resources. Think carefully about how much of each you will put toward your activities. Be realistic about what you can accomplish given the people, time and dollars available. Check your internal scan for valuable information about your capacity and budget. Then prioritize the activities and rework the plan if necessary.

Make sense? Go to Smart Chart 4.0 and plot your activities under Step Four. You can brainstorm and then fill in the most viable tactics to reach your key audiences, as well as the timeline (when it happens), assignments (who does it) and budget (money and staff time).

Step Five:

Create Measurements of Success

As you implement your strategy, it is important to monitor your progress. Identifying both quantifiable (statistics) and anecdotal (stories) information to measure the success of your communication efforts helps you show progress to internal audiences such as staff, coalition partners and volunteers as well as external audiences such as funders, community members and policymakers.

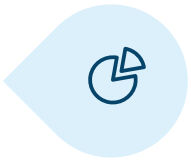
How do you know it's working?

The measure of your communication success should show how your activities or outputs are tied to the results you expect, or your outcomes. Outputs are the things you are doing to move your strategy forward – what you are putting out into the world. Outcomes are what happens as a result of your activity.

Every output should have a corresponding outcome. Think of it like this: If I do this activity, what do I expect to happen as a result of that activity? It's important to have one outcome for every output. That is the true measure of your efforts.

> **It's important to have one outcome for every output. That is the true measure of your efforts.**

Or, if you want to generate five news articles (output) on education issues, what is supposed to happen as a result of all the hard work you have done to get those articles placed? Some nonprofits consider generating the five news articles as the outcome, not the output. But, did the news article spur action like letters to the editor or a conversation on Twitter with the decision-maker? Any output without a corresponding outcome is not useful.



EXAMPLE

Consider this: Georgetown Law's Center on Privacy & Technology published an investigation on the largely unknown and unregulated police use of facial recognition technology. They found over 50% of U.S. adults were in recognition databases searchable by law enforcement and that women, young people, and Black communities were disproportionately affected. Covered by all major media outlets, the attention resulted in significant outcomes. In Maryland, where the report received front-page and editorial page coverage, a state legislator offered a bill to regulate face recognition. In Vermont, the American Civil Liberties Union was able to end the state's use of face recognition on

driver's license photos. And currently, cities across the U.S., from San Francisco, CA to Cambridge, MA, are enacting their own bans on law enforcement's use of this powerful technology.

Both outputs and outcomes should have numbers attached to them. If you fall short of your output estimate, you can decide whether that's all right or whether you need to make a midcourse correction to increase the outcomes.

For example, if you send out 150,000 emails to gather signatures for your online petition (output), you may set the outcome to be 15,000 signatures. However, if after two rounds of emails you only have 7,000 responses, you will need to decide whether you need to change up the messaging, the audience or the delivery method. That enables you to see progress in real time while there's still a chance to correct and make your goal.

Supporters may view a video message from your CEO (output) as more inspirational than a letter and decide to get more involved in local environmental efforts (outcome). If you write an elevator speech and train your staff and volunteers to use it (output), they are better prepared to promote your organization, which could lead to more partners or resources (outcome). By pairing a measurable outcome with each output, you can decide whether the activity is valuable and getting you closer to your objective or whether you should replace it with an output that has more kick.

The purpose of your communication strategy is to ensure your messages are getting to the right audiences and that those audiences are doing what you want. Incorporate feedback loops and regular check-ins with your teams and supporters to make sure your communication activities are going the way you want them to go. People delay doing this. Please don't. If your strategy isn't working, you need to know as soon as possible so you can save time and money by revising and refining it.

Revising your communications is a reality of communication efforts. It is not a sign of failure! Don't be afraid to review and reconfigure your efforts as you acquire more data or information. Charting measurements of success will help.

The purpose of your communication strategy is to ensure your messages are getting to the right audiences and that those audiences are doing what you want.

Pro Tip

As you review what is happening, look at it on three levels. If you aren't making the progress you want, is it a bad objective, a bad strategy or bad execution? A bad objective means you are going after something that isn't viable. You may need to change what you have set your sights on, e.g., the legislative environment is not conducive to change, and you may need to do more to get voluntary corporate policy instead with the idea that this will build the political will for change. You may have a good objective, but your strategy for achieving it is failing. Maybe you have the wrong audience or an ineffective message. Often, both the objective and strategy are solid but the execution is lacking. Maybe things are too last minute to generate the response you want or the language and visuals bringing the message to life are lackluster. Figure out where the problem is. Don't throw out all your thinking without doing this first.

Now you're ready: Put your plan in play.

A communication strategy is a working document. It's meant for you and your team to implement. Try it out and see how it works. This isn't a five-year plan that sits on a shelf. It should serve as a work strategy for immediate action. But first, make sure it's clear and sensible.

Go to Smart Chart 4.0. Fill in your measurements of success and use the checklist of questions to test your strategy.

Here are steps to check your work:

- ☐ Make sure your plan and activities are consistent with your organization's values and mission.
- ☐ Test your Smart Chart decisions. Your strategic choices should align to create a consistent approach.
- ☐ Examine your assumptions to ensure your choices are sound, and identify where you may need further research to confirm or adjust. How do you know you've identified the correct value or barrier for your audience? Did you base it off a feeling, or did you back up your answer by finding online polling; talking to the audience formally (through focus groups) or informally (in small-group discussions); or using available research from universities, consumer groups or other reliable sources? Other assumptions to review may include your choice of the ultimate decision-maker or where your audiences get their information.
- ☐ Make sure your logic holds up to scrutiny before you begin to invest resources in putting your strategy into practice.
- ☐ Is there buy-in from your organization to implement the strategy? Share your strategy with your team and others who can provide important feedback and suggestions. They could be the people who will carry out the strategy and communication activities, people who are most affected by the issue you are working on, and other important supporters and allies. This is important, particularly for those who will be responsible for implementing the strategy – those who are creating materials, meeting with policymakers or community members, and executing the activities. Their suggestions and insights can be invaluable to revising and improving your communication plan. If possible, share the plan with them as you are developing it, and bring them into the process. You don't want to finish a beautiful communication strategy only to have the field team say it won't work!
- ☐ And finally, can you measure progress? Once you have finalized your plan (at least for now!) and started your activities, don't forget to visit and revisit your measurements of success along the way (Step Five). This is how you will know if your plan is working, whether you are making headway and whether your strategies are falling into place. If you are moving more quickly or slowly than you expected, you may need to change, update or revise some things. Make sure you have a system in place to check in and make course corrections when necessary.

Now it's your turn. Create a new communication effort or evaluate a past one by using Smart Chart 4.0. All set? OK. Ready, set, go ...

Good luck, have fun and spark change

Note:

This guide highlights examples of organizations that have used communication to educate segments of the public as well as policymakers. The examples in this guide are used solely to illustrate points and are not intended to advocate for specific legislation. Communication efforts that involve specific legislation could constitute lobbying and must be accounted for according to lobbying laws that govern 501(c)(3) activity.

Spitfire Strategies created Smart Chart 4.0.

Spitfire Strategies provides strategic communication solutions to advance racial, economic and social justice; protect the environment; and expand opportunity. Our objective is to help organizations use their voice in a strong, clear and compelling way to articulate their vision of a better world that is more equitable, diverse and inclusive. To learn more about Spitfire Strategies or to download additional copies of Smart Chart 4.0, visit our website at www.spitfirestrategies.com.

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From our external reviewers, friends and leading communicators:

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From Spitfire leadership and authors

Dennis Poplin, Erin Hart and Kristen Grimm

Links to resources and studies cited

Step One

Theory of Change and Logic Model resources

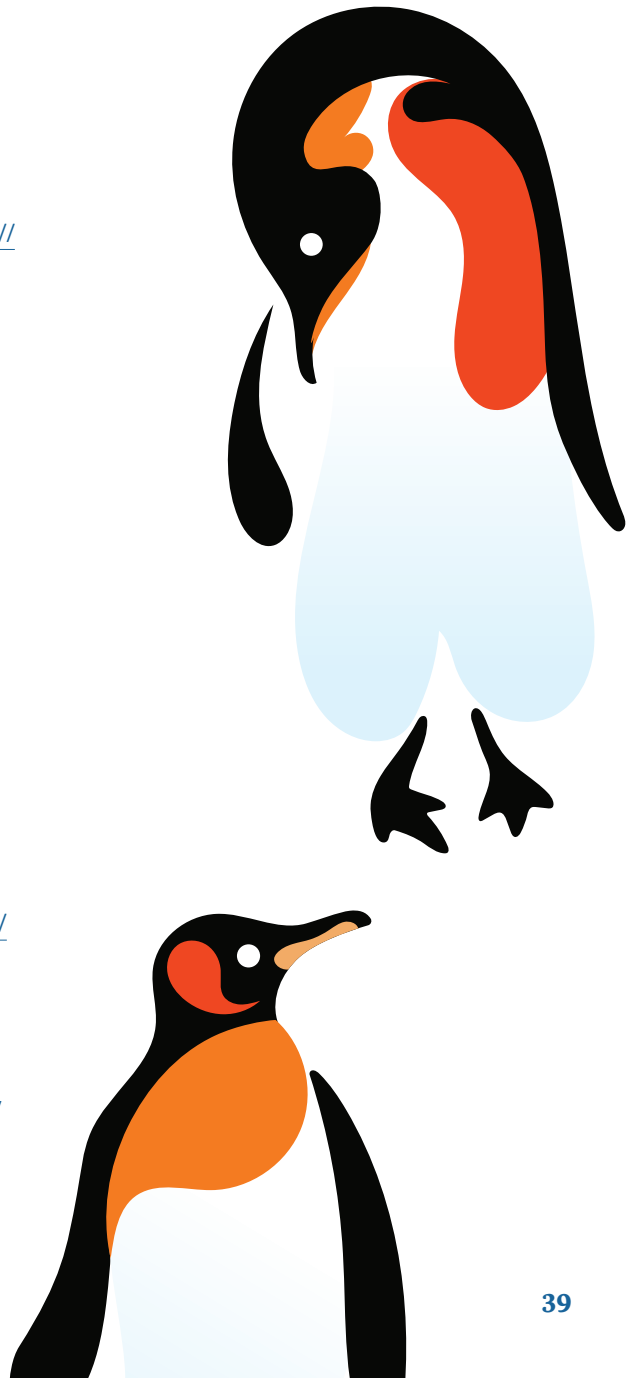
A logic model is a graphic depiction (road map) that presents the shared relationships among the resources, activities, outputs, outcomes, and impact for your program. It depicts the relationship between your program's activities and its intended effects. Learn more about logic models and the key steps to developing a useful logic model on the CDC Program Evaluation Framework Checklist. https://www.cdc.gov/eval/steps/step2/index.htm\

Power analysis and mapping resources

Communities Creating Healthier Environments - Power Analysis Process. http://mccunefoundation.org/wp-content/uploads/2013/05/Power-analysis.pdf

Step Two

1. Studies from Adrian Furnham and Hua Chu Boo –
   A Literature Review of the Anchoring Effect, Adrian Furnham and Hua Chu Boo February 2011 *Journal of Socio-Economics* 40(1):35-42 https://www.researchgate.net/publication/227422386_A_Literature_Review_of_the_Anchoring_Effect
2. External Scan Science Says:
   Can We Sustain It? Kristen Grimm and Emily Gardner, June 26, 2017 *Stanford Social Innovation Review* https://ssir.org/articles/entry/can_we_sustain_it
3. Tying pollution to personal health. https://www.theguardian.com/sustainable-business/2016/jul/05/how-air-pollution-affects-your-health-infographic
4. Learn what the Dominant Conversation is:
   Learn how three years of Big Listening (and testing) may change your campaigning, Ted Fickes, MOBLAB April 10, 2015 https://mobilisationlab.org/stories/learn-how-3-years-of-big-listening-and-testing-may-change-your-campaigning/
5. This is a clear example of asset framing, a concept developed by Trabian Shorters. Asset framing uplifts communities' strengths (in this case, love, commitment and family) rather than referring to, or defining communities by the challenges they're facing.http://trabianshorters.com/asset-framing/



No matter which option you take, a number of studies[6] have found that to build support for issues,[7] frames must resonate with the values, interests and worldviews of the audience or community in which the frames will be used.

6. Maibach, E.W., Nisbet, M., Baldwin, P. et al. Reframing climate change as a public health issue: an exploratory study of public reactions. *BMC Public Health* 10, 299 (2010). https://doi.org/10.1186/1471-2458-10-299

7. Lynn H. Fujiwara, Immigrant Rights Are Human Rights: The Reframing of Immigrant Entitlement and Welfare, *Social Problems*, Volume 52, Issue 1, 1 February 2005, Pages 79–101, https://doi.org/10.1525/sp.2005.52.1.79

Step Three

psychographics

Spitfire Strategies Mindful Messaging. This guide helps you thoughtfully consider who we are trying to engage, anticipate how their brains might process messaging we use and keeps us from making predictable mistakes that set us back rather than propel us further. It helps facilitate two-way communication so messaging leads to useful dialogue about important issues rather than dead ends. https://mindfulmessaging.spitfirestrategies.com/

How you reach each audience will be different based on a variety of factors, such as their interests, where they get their information (and what channels are best to reach them) and who they listen to about issues they care about (we'll consider these "credible messengers" a little later).

A practitioner's guide to the principles of COVID-19 vaccine communications: Center for Public Interest Communications and United Nations Verified initiative.https://covid19vaccinescommunicationprinciples.org/

Science Says

8. This table offers examples of psychological insights you might encounter. Matjasko JL, Cawley JH, Baker-Goering MM, Yokum DV. Applying Behavioral Economics to Public Health Policy: Illustrative Examples and Promising Directions. *Am J Prev Med*. 2016;50(5 Suppl 1):S13-S19. doi:10.1016/j.amepre.2016.02.007 https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4871624/table/T1/?report=objectonly

Readiness

For example, seeing a movie or television program will make people feel like they experienced what the main characters are experiencing directly.

9. Michael D. Slater, Donna Rouner, Entertainment-Education and Elaboration Likelihood: Understanding the Processing of Narrative Persuasion, *Communication Theory*, Volume 12, Issue 2, 1 May 2002, Pages 173–191, https://doi.org/10.1111/j.1468-2885.2002.tb00265.x

Jaqueline Mattis says that hopeful people "do not wish, they imagine and act." She offers 5 steps to cultivate hope.

10. A psychologist explains how hope can make a difference in impossible times - Jacqueline S. Mattis/*The Conversation* January 11, 2021 https://www.popsci.com/story/health/find-hope-make-change/

Science Says:

Daniel Kahneman, who won the Nobel Prize for his work on behavioral economics, makes this case around people who get tired of minding the practices we need to do to defeat a global pandemic.

11. https://www.washingtonpost.com/health/covid-risks-stop-seeming-so-scary/2020/08/21/09c286c4-cc49-11ea-bc6a-6841b28d9093_story.html

For more information on ways to identify and overcome barriers, see Spitfire's Discovering the Activation Point™ report at www.activationpoint.org. Activation Points helps you find best practices for planning for persuasion, tailored to the unique needs of social change organizations.

Core Values

Yet, often when we try to build support for the issues we care about, Matthew Feinberg and Robb Willer have shown that we tend to lead with our own beliefs rather than the values and worldview of the people we are communicating with.

12. Feinberg, Matthew & Willer, Robb. (2012). The Moral Roots of Environmental Attitudes. *Psychological science*. 24. 10.1177/0956797612449177. https://www.researchgate.net/publication/233891517_The_Moral_Roots_of_Environmental_Attitudes

Science says: "But, what happens if…?"

Studies show that people often place a higher priority on what they might lose rather than what they might gain.

13. Why do we buy insurance? Loss aversion, explained. The Decision Lab https://thedecisionlab.com/biases/loss-aversion/

Science says: "What value is more valuable?"

A study around food found that people prioritize taste over health. Surprised? Encouraging healthier eating by using nutritional information was not nearly as motivating as talking about healthy foods as tasting good.

14. There's a simple way to make healthy food appealing. October 3RD, 2019 NATHAN COLLINS-STANFORD https://www.futurity.org/healthy-foods-flavor-names-2176012/

Deeper Dives: Values

Researchers have surveyed thousands of people around the world to measure what is morally important to them and identified five values that guide intuition: care, fairness, in-group loyalty, respect for authority and purity. People who are liberal tend to value care and fairness. Graham and Haidt (2012) note that people who are conservative tend to value respect for authority, in-group loyalty and purity/sacredness.

15. Graham J, Nosek BA, Haidt J (2012) The Moral Stereotypes of Liberals and Conservatives: Exaggeration of Differences across the Political Spectrum. *PLoS ONE* 7(12): e50092. https://doi.org/10.1371/journal.pone.0050092

For example, Feinberg and Willer (2013) assessed whether message frames with values of fairness/care and purity/sanctity were effective in shifting conservative beliefs toward climate change.

16. The Moral Roots of Environmental Attitudes, Matthew Feinberg, Robb Willer *Psychological Science* (Sage Publications Inc.), December 2012 https://doi.org/10.1177/0956797612449177

For example, studies have shown that people will go out of their way to avoid relevant health information (like whether they have a sexually transmitted disease or are at risk for other health issues) if it would make them feel bad or anxious or require them to follow up with actions they would rather avoid.

17. Sweeney, A. M., & Moyer, A. (2014, August 4). Self-Affirmation and Responses to Health Messages: A Meta-Analysis on Intentions and Behavior. *Health Psychology*. Advance online publication. https://pubmed.ncbi.nlm.nih.gov/25089345/

Research confirms[18] that people hold unconscious biases toward others that influences how they interact and may result in racist, sexist or other discriminatory behavior. For example, studies have shown[19] that because of implicit bias, Black patients get different care than white ones. Research also[20] shows that just telling health care professionals this, doesn't change the way they act. Even training on implicit bias can lead to people thinking bias "just is" and they can't change it.

18. Fazio RH, Olson MA. "Implicit measures in social cognition. research: their meaning and use." *Annual Rev Psychol*. 2003;54:297-327. Epub 2002 Jun 10. PMID: 12172003. https://pubmed.ncbi.nlm.nih.gov/12172003/

19. Hall WJ, Chapman MV, Lee KM, et al. "Implicit Racial/Ethnic Bias Among Health Care Professionals and Its Influence on Health Care Outcomes: A Systematic Review." *Am J Public Health*. 2015;105(12):e60-e76. doi:10.2105/AJPH.2015.302903 https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4638275/

20. Blair IV, Steiner JF, Havranek EP. Unconscious (implicit) bias and health disparities: where do we go from here?. *Perm J*. 2011;15(2):71-78. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3140753/

Frames, Narratives and Messages that Motivate

A narrative, according to the Narrative Initiative, "reflects a shared interpretation of how the world works."

21. What is Narrative? https://narrativeinitiative.org/what-is-narrative/

Pro Tip: Want to learn more about framing and narrative, here is a great library of resources.

22. Narrative // Power // Culture // Change - Wanna make the world better? The ideas in this library can help. *Narrative Initiative*, September 7, 2017 https://medium.com/@_Narrative/narrative-power-culture-change-a10dc41c4bc6

Color of Change tackles this in Changing Our Narrative About Narrative.

23. BUILDING NARRATIVE POWER. Papers and Presentations Focused on Strategy, Infrastructure & Content for Culture Change and Narrative Change Strategies https://narrative.colorofchange.org/

Look at the recent Stop Hate for Profit campaign backed by groups like Color of Change, NAACP, and National Hispanic Media Coalition which shows frame, narrative and messaging aligned and working to inspire action.

24. Inside the Ad Boycott That Has Facebook on the Defensive. *Politico Magazine* By Nancy Scola 07/03/2020 https://www.politico.com/news/magazine/2020/07/03/activists-advertising-boycott-facebook-348528

Science says. "So many feelings!"

People make decisions based on emotions[25] more than facts. That means choosing the right emotion for your communication is a strategic decision. And guess what? Fear and shame seldom are the best emotions to tap. That's good to know because there are lots to choose from. Explore all the emotions possible[26] and pick the one that might motivate your audiences most effectively. Take some risks. Caty Borum Chatoo[27] encourages people to be "funny and deviant, not dark and pessimistic." She has evidence to back this up. Shankar Vedantam reminds us that over-emphasizing certain emotions like outrage may backfire as this Hidden Brain episode[28] notes.

25. Jung N, Wranke C, Hamburger K, Knauff M. How emotions affect logical reasoning: evidence from experiments with mood-manipulated participants, spider-phobics, and people with exam anxiety. *Front Psychol*. 2014;5:570. Published 2014 Jun 10. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4050437/

26. Plutchik's Wheel of Emotions: Exploring the Emotions: *Six Seconds* blog. https://www.6seconds.org/2020/08/11/plutchik-wheel-emotions/

Plutchik R. (1988) The Nature of Emotions: Clinical Implications. *Emotions and Psychopathology*. Springer, Boston, MA. https://link.springer.com/chapter/10.1007%2F978-1-4757-1987-1_1

27. Comedy and Social Justice: Using Laughs to Change Hearts and Minds. https://www.spitfirestrategies.com/comedy-and-social-justice-using-laughs-change-hearts-and-minds

Caty Borum Chattoo, Lauren Feldman, Storytelling for Social Change: Leveraging Documentary and Comedy for Public Engagement in Global Poverty, *Journal of Communication*, Volume 67, Issue 5, October 2017, Pages 678–701, https://academic.oup.com/joc/article-abstract/67/5/678/4642190

28. Screaming Into The Void: How Outrage Is Hijacking Our Culture, And Our Minds. Shankar Vedantam NPR *Hidden Brain* podcast. October 7, 2019 https://www.npr.org/2019/10/04/767186846/screaming-into-the-void-how-outrage-is-hijacking-our-culture-and-our-minds

Science says. "What's this about reinforcing the barrier?"

If we want to get people to open their minds, we need to ask questions – and listen to answers. Honest questions that demonstrate that we *really* want to know. Debating can actually harden people into their positions instead of considering new perspectives. We can take a page from the process of motivational interviewing to engage audiences in finding what will motivate them to change. In the article where Adam Grant explains this, he shows the power of shifting a question from "why not" to "how" opens up conversations. And from there change may be possible.

29. The Science of Reasoning with Unreasonable People. Adam Grant. *New York Times* January 31, 2021. https://www.nytimes.com/2021/01/31/opinion/change-someones-mind.html?action=click&module=Opinion&pgtype=Homepage

Another opportunity to change someone's mind comes from a study of screenwriters in Hollywood.

30. How to Pitch a Brilliant Idea by Kimberly D. Elsbach *Harvard Business Review* September 2003 https://hbr.org/2003/09/how-to-pitch-a-brilliant-idea

Science Says: "Where did you get this?"

Peer-to-Peer: Research by social psychologist Samuel Gaertner and his colleagues (1996) suggested that people are more likely to believe others in their group – people who are like them.

31. Samuel L. Gaertner, John F. Dovidio, Betty A. Bachman. Revisiting the contact hypothesis: The induction of a common ingroup identity. *International Journal of Intercultural Relations*, Volume 20, Issues 3–4, 1996, Pages 271-290, ISSN 0147-1767, https://www.sciencedirect.com/science/article/pii/0147176796000193

Credibility: Research by communications scholars Miriam Metzger and her colleagues (2010) used focus groups to examine assumptions about information credibility.

32. Miriam J. Metzger, Andrew J. Flanagin, Ryan B. Medders, Social and Heuristic Approaches to Credibility Evaluation Online, *Journal of Communicatio*n, Volume 60, Issue 3, September 2010, Pages 413–439, https://doi.org/10.1111/j.1460-2466.2010.01488.x

Influence: Social psychologist Elizabeth Paluck and her colleagues (2016) wanted to see whether they could reduce bullying at 56 middle schools by working with school influencers to share anti-conflict new behavior norms.

33. Changing climates of conflict. Elizabeth Levy Paluck, Hana Shepherd, Peter M. Aronow *Proceedings of the National Academy of Sciences* Jan 2016, 113 (3) 566571; DOI: 10.1073/pnas.1514483113 https://www.pnas.org/content/113/3/566.short

Step 4

Communication Activities

Certain media outlets appeal to and reach particular demographic and cultural groups, and people with distinct interests

34. https://www.pewresearch.org/topics/ethnic-media/

Research tells us[35] that people are much more likely to remember information when it is in a story. When information is repeated, studies show[36] it is believed to be true, and when we include emotions like surprise, anger or disgust, we are[37] more likely to share information. It's just human nature.

35. Bower, G.H., Clark, M.C. Narrative stories as mediators for serial learning. *Psychon Sci* 14, 181–182 (1969). https://link.springer.com/article/10.3758/BF03332778

36. Soroush Vosoughi, Deb Roy, Sinan Aral. The spread of true and false news online. *Science* 09 Mar 2018: 1146-1151 https://science.sciencemag.org/CONTENT/359/6380/1146.abstract

Fazio, L. K. (2020). Pausing to consider why a headline is true or false can help reduce the sharing of false news. *Harvard Kennedy School (HKS) Misinformation Review*. https://misinforeview.hks.harvard.edu/article/pausing-reduce-false-news/

37. Jonah Berger, Katherine L. Milkman. What Makes Online Content Viral? *Journal of Marketing Research* April 1, 2012 Research Article https://journals.sagepub.com/doi/abs/10.1509/jmr.10.0353

38. Greifeneder R, Bless H, Pham MT. When Do People Rely on Affective and Cognitive Feelings in Judgment? A Review. *Personality and Social Psychology Review*. 2011;15(2):107-141. https://journals.sagepub.com/doi/abs/10.1177/1088868310367640

People are also more likely to hear your messaging[39] if it provides some useful information that will help them, keeps them in good standing with their social groups and connects them to their sense of identity. We know that people[40] are also more likely to seek out information that reflects how they already see the world. Be careful, though. Studies demonstrate[41] that selective exposure and confirmation bias – a tendency to accept only information that validates how people already see the world – pose a challenge to ideas that may be new or counterintuitive to an audience.

39. Corine S. Meppelink, Edith G. Smit, Marieke L. Fransen & Nicola Diviani (2019) "I was Right about Vaccination": Confirmation Bias and Health Literacy in Online Health *Information Seeking, Journal of Health Communication*, 24:2, 129-140, https://www.tandfonline.com/doi/full/10.1080/10810730.2019.1583701

40. Raymond S. Nickerson. Confirmation Bias: A Ubiquitous Phenomenon in Many Guises *American Psychological Association Division 1 (Society for General Psychology)* Published June 1, 1998 https://journals.sagepub.com/doi/abs/10.1037/1089-2680.2.2.175

41. R. Kelly Garrett, Echo chambers online?: Politically motivated selective exposure among Internet news users, *Journal of Computer-Mediated Communication*, Volume 14, Issue 2, 1 January 2009, Pages 265–285, https://doi.org/10.1111/j.1083-6101.2009.01440.x

Ashley Muddiman, Natalie Jomini Stroud, News Values, Cognitive Biases, and Partisan Incivility in Comment Sections, *Journal of Communication*, Volume 67, Issue 4, August 2017, Pages 586–609, https://academic.oup.com/joc/article-abstract/67/4/586/4642138

Communicating information through entertainment in popular culture may be one of the best ways to break through politicized information sources and help people care and remember information. For example, films like "The Day After Tomorrow", "Inconvenient Truth" and "Standup Planet" have been found to increase interest and action on environmental issues[42]. Consider how your messaging might tap into that connection.

Spitfire Strategies AndACTION. AndACTION is a platform allowing do-gooders and good storytellers to join forces. https://andaction.org/

42. Beattie, Geoffrey ; Sale, Laura & Mcguire, Laura (2011). An inconvenient truth? Can a film really affect psychological mood and our explicit attitudes towards climate change? *Semiotica* 2011 (187):105-125. https://www.researchgate.net/profile/Geoffrey_Beattie/publication/270480063_An_inconvenient_truth_Can_a_film_really_affect_psychological_mood_and_our_explicit_attitudes_towards_climate_change/links/5790e5b908ae4e917d0466ac.pdf

Slater, M.D. and Rouner, D. (2002), Entertainment—Education and Elaboration Likelihood: Understanding the Processing of Narrative Persuasion. *Communication Theory*, 12: 173-191. https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1468-2885.2002.tb00265.x

Thomas Lowe, Katrina Brown, Suraje Dessai, Miguel de França Doria, Kat Haynes, Katharine Vincent. Does tomorrow ever come? Disaster narrative and public perceptions of climate change. *Public Understanding of Science*. October 1, 2006 Research Article https://journals.sagepub.com/doi/abs/10.1177/0963662506063796

Now you are ready to put your plan into play

Science says: "Is that like first impressions?"

People use shortcuts to quickly decide what they think about something and knowing what these are can be useful.

43. Your Brain Doesn't Work the Way You Think It Does. Clay Skipper. November 30, 2020 *Gentlemen's Quarterly* https://www.gq.com/story/lisa-feldman-barrett-interview

Spark Change