

**Community Engagement Toolkit:  
Organizing Your Community  
\*Participant Guide**



## Building Demand through Community Engagement

This toolkit is designed for individuals and organizations implementing local community engagement campaigns. These resources provide a framework for organizing community demand for energy services.

These successful tactics emerged from our experience implementing a local community engagement program in Washington, D.C. Over the past two years, we have tested and refined these tools, which emphasize cultivating long-term relationships with individual community members.

How do community organizers build relationships and trust? It all starts with a genuine story. The Organizing Your Community section demonstrates the importance of personal storytelling to relate to people with whom you want to work and includes guidance on how to grow that public relationship and establish a team.

Section 1 provides an overview of how organizers can tell their stories. Section 2 dives into how to build successful relationships. Section 3 offers extensive resources on building and maintaining successful volunteer and organizing teams. Each of these sections can be taught or shared on their own or as part of a training on community engagement.

Groundswell adapted and modified this material from the works of Marshall Ganz at Harvard University and The New Organizing Institute.

## Section 1: Narrative (Story of self, us, and now)

**Purpose:** To develop the important organizing skills of a personal and community based public narrative

**Time:** 1 hour

**Overview:** This section provides materials that will help you to tell your story - your public narrative. It's important to be able to tell your story to get others excited about working with you to build excitement and interest in your organizing efforts.

Module	Activities	Outcomes
Public Narrative	<ul style="list-style-type: none"><li>• Story of Self practice</li><li>• Story of Us &amp; Now practice</li></ul>	<ul style="list-style-type: none"><li>• You will have the ability to tell your personal organizing stories to use in the field and effectively train others</li></ul>

*Why do we tell our story – our public narrative?* The success of organizing depends entirely on active volunteer and community leadership networks. There are many challenges that organizers face connecting with volunteer & community leaders. Organizers use Public Narrative to connect their strategy with the values that drive individuals to take action and volunteer.

*What is Public Narrative?*

Public Narrative is a framework to explain the work that organizers do in a way that does not get caught up in the mechanics of the program or strategy (*the what*), but rather conveys the values of the campaign and connect with emotions that spur us to act (*the why*). Stories do not tell why volunteers should join the campaign but rather they show volunteers through human experience. There are three different types of public narrative – story of self, story of us, and story of now. Each story helps us to build connections with our organizing partners.

*What is the Public Narrative structure?*

All good stories whether in a Hollywood blockbuster or a Public Narrative (story of self, of us, and of now) have a common structure of a challenge, a choice, and an outcome. The challenge represents an obstacle that you faced, the choice represents how you handled the challenge, and the outcome demonstrates the consequences of your actions. By telling your story using this framework, you can demonstrate to others the power of both individual and collective actions, and inspire them to act.

Story of Self	Story of Us	Story of Now
<i>Why I am called to this work? And why should people follow me as a leader?</i>	<i>Why we matter in this effort?</i>	<i>What we are called to do right now?</i>
<ul style="list-style-type: none"> <li>• Demonstrates individual values through a past challenge, choice, and outcome</li> <li>• Specific events that are visible – describe things that people can see, smell, and feel</li> <li>• Not a career overview or chronicle of life stories</li> </ul>	<ul style="list-style-type: none"> <li>• Creates solidarity among a larger group</li> <li>• Connects individual values with the values of those with whom we seek to take action</li> <li>• Identifies common challenges and struggles as well as shared hopes and visions</li> </ul>	<ul style="list-style-type: none"> <li>• Creates urgency to take action now</li> <li>• Demonstrates the outcomes of change would occur if we take immediate action</li> </ul>

## Activity: Public Narrative

This section will help you and your partners to practice telling your stories.

### Part I: Story of Self

Before you decide what part of your story to tell, think about these questions:

1. What will I be calling on others to do?
2. What values move me to take action and might also inspire others to similar action?
3. What stories can I tell from my own life about specific people or events that would show (rather than tell) how I learned or acted on those values?

**What are the experiences in your life that have shaped the values that call you to leadership in this campaign?**

#### FAMILY & CHILDHOOD

Parents/Family  
Growing Up  
Your Community  
Role Models  
School

#### LIFE CHOICES

School  
Career  
Partner/Family  
Hobbies/Interests/Talents  
Finding Passion  
Overcoming Challenge

#### ORGANIZING EXPERIENCE

First Experience of organizing  
Connection to key books or people  
Role Models

Think about the challenge, choice and outcome in your story. The outcome might be what you learned, in addition to what happened. Try drawing pictures here instead of words. Powerful stories leave your listeners with images in their minds that shape their understanding of you and your calling.

CHALLENGE:	CHOICE:	OUTCOME:

## **Story of Us & Now**

The purpose of the Story of Us & Now is to create a sense of community and invite your audience to join the community in taking action and making a difference. Your goals are to tell a story that:

- Evokes the shared values that unite us
- Shows the challenges we face that make action urgent
- Gives us hope that we can make a specific change
- Invites us to join the community by taking action now

**Worksheet:** Use these questions to help you put together your story of Us & Now:

**Defining the Us:** Who is the Us you want people to feel a part of? What common values do we share? What specifically have we experienced together?

**Showing the challenges We face:** What is the challenge our community faces? Make the challenge real with images and stories, not just a list of the facts.

**Demonstrating the hopeful outcomes:** What do we hope for? Where does that hope come from? How do we know that we can make change? What images of the future do you have that reflect how things could be different?

**Defining the choice and urging action:** What specific choice are you asking others to make? What is our strategy? What specific action do we need others to join us in taking?

**Action and practice:** Take time to practice your story of Self, Us, and Now within small breakout teams or with a partner.

## Section 2: Building Public Relationships

**Purpose:** To learn and practice the basic theories behind building organizing relationships based on values and shared self-interest.

**Time:** 1 hour

**Overview:** As organizers, we rely on relationships with other committed individuals and organizations to help drive interest and participation in our work. These worksheets provide information and exercises on how to best structure a one on one meeting to build these critical relationships.

Module	Activities	Outcomes
Building Volunteer Relationships	<ul style="list-style-type: none"><li>• 1 on 1 meeting practice</li></ul>	<ul style="list-style-type: none"><li>• You will have practiced the relationship building tactic of holding a 1 on 1 for your work in connecting with community leaders</li></ul>

### *Why do we build public relationships in organizing?*

At first glance, it may seem trivial that we would have to teach people how to build relationships. We all have relationships with our friends, family, and coworkers. But public relationships are different and what allow us to have power. Organizers believe that it is through human-to-human interaction and building relationships that people will continue to relate to our campaign as active members.. Saving money on one's energy bills alone will not inspire somebody to take action, only people and relationships can.

### *What are Public Relationships?*

Public relationships move beyond merely completing tasks together, but are based on something deeper and more fundamental.

- **Shared values** - Recall the Story of Self – we tell stories to convey individual and collective values and this is exactly where a public relationship begins.
- **Shared purpose** – Public relationships moves to shared purpose or a collective understanding of how the campaign will make change in adherence to the shared values.
- **Diverse skills & resources** – To strengthen our common effort we need to build relationships with people whose experiences and skills are different from each other.

- **Commitment** – If values and purpose are the foundation for our relationships, shared commitment is the glue that holds them together.
- **Shared growth and learning** – Relationships are not static but require commitment and continual communication of interests over time.

*How do we build relationships?*

There are two excellent tools in an organizer's toolbox that can be used to build relationships: the 1 on 1 meeting and the team strategy meeting. These tactics create the space and time to identify the important components that build a relationship. In these spaces an organizer must lead a discussion on:

- **Interest** – Share personal stories and highlight the values that drive us
- **Exploration** – Explore personal stories to dig deeper into values and experience by asking 'why' questions?
- **Exchange** – Figure out what resources each member brings to the campaign
- **Commitment** – Relationships happen beyond one meeting, when wrapping up a 1 on 1 or team strategy meeting plan and commit to take action together.



## Activity: Building Relationships | 1 on 1 Practice

This activity will help you to understand how to successfully lead a one on one meeting, an important part of building relationships.

### Goals

1. Practice the art of the 1 on 1 conversation by using probing questions to understand each other's values, purpose and resources.
2. Uncover your team's common values and shared interests. Identify and draw out each other's unique skills and resources.

### Agenda: TOTAL TIME: 45 minutes

1. Gather in your team. Choose a timekeeper and note-taker. Review the agenda below. 2 min.
2. Break into pairs. **Practice a One-on-one.** 15 min
  - One person initiates the conversation: Ask Questions (GO DEEP!) and share some of your own story too.
  - After 10 minutes switch roles and let your partner drive the conversation more.
  - Listen carefully and write these down for later:
    - Your **common values** (the things you care about and have a motivated commitment to; e.g. education, family)
    - Your **shared interests** (the real-world expression of your values; e.g. good schools in our neighborhood, securing my weekends for family time )
    - Your **skills and resources** (the things you have and bring to the team; e.g. time, contacts, data skills, energy)
  - **Make a specific commitment** to each other and the leadership team.
3. Get to know your team. 10 min

**Each pair reports back on the following two questions:**

- What did you learn about the common values and interests that motivate you to take action?
- What did you learn about what skills and resources each of you bring to this team?

Ask your note-taker to record these on flipchart paper for your whole team like this:

Our Common Values & Interests	Our Unique Skills & Resources
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4. Summarize your key lessons from this exercise. What are you taking away? 3 min

### Section 3: Structure & Teams

**Purpose:** To learn the basics behind and practice the exercise of building independent organizing teams.

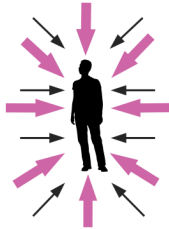
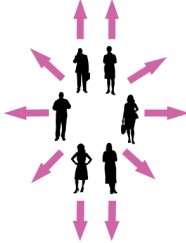
**Time:** 1 hour

**Overview:** This section will help you to build teams of volunteers and supporters who will partner with you to get out your message.

Module	Activities	Outcomes
Building Volunteer Teams	<ul style="list-style-type: none"> <li>Building volunteer teams practice</li> </ul>	<ul style="list-style-type: none"> <li>You will have a grasp of the process and language of building volunteer teams for 1 on 1 meetings with community leaders</li> </ul>

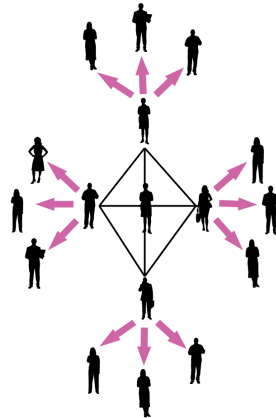
If an organizing campaign prioritizes and is effective at building public relationships it will solidify and grow its volunteer networks. This is the most important step that any campaign can make because people are our power, but what next? Next, organizers need to work with their public relationships and build teams to take action together. It is these teams that will carry out the outreach and engagement tactics of the campaign.

What type of leadership team should we build with our volunteers? Below are two examples of team models that often result when volunteers work together:

Often we think the leader is the person that everyone goes to:	Often entire teams assume the role as the leader and go their own directions:
	

These two common examples of team structure can sometimes work but are they the most effective? Who is responsible for the success of the team?

Effective team leadership requires delegating responsibility (not merely tasks) across the entire team. This is accomplished with the Interdependent Leadership “Snowflake” approach:



The lines and arrows connecting each individual within the snowflake do not merely represent lines of communication, but rather they represent relationship and commitment.

## Activity: Developing Shared Purpose

This activity will guide you through an exercise to understand the shared purpose of your teams.

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### Agenda of exercise: SHARED PURPOSE (40 minutes total)

1. **Individual Work** – Silently brainstorm and craft a sentence to clarify your own thinking about the team’s purpose.  
10 min
2. **Team Work** – Ask each person to read their sentence to the group and have the group record and share words that resonated with them.  
10 min
3. **Individual Work** – Use the highlighted key words and themes to craft a new sentence that describes the team’s purpose.  
10 min
4. **Team Work** – Read individual sentences aloud again. Select one sentence (or combine) to articulate your team’s shared purpose.  
10 min

### Part I: Individual Work (10 minutes)

In the first column, write down **whom your team serves**: who is your constituency? What are the people like and what are their interests? What will engage them?

- In the second column, based on the work you did on common interests and values in the relationship session; write down the **goals that are unique to your team. Be specific to what your team is trying to achieve.**
- In the third column, write down the kinds of activities that your team could engage in to fulfill its purpose by serving this community? What is the **unique work that your team could do?**

We are organizing _____ (who - constituency)	to do _____ (what –outcome)	by _____ ____ (how - <i>list the specific          activities that your team          would undertake to achieve          your goal.</i> )
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**After brainstorming answers to all three questions, take a few moments to write a sentence that you think best describes your team’s purpose, its constituency, and its activities. Draw on all three columns.**

Example of a shared purpose sentence:

- We are organizing CSEA members who care about education funding and want to do something about it to move our elected officials (Assemblyperson, School Board, State Senator) to support the three goals of the CAUSE Campaign by going to chapter meetings, having 1-to-1 site visits, calling targetting lists, and taking nonviolent direct action.

**Our team’s shared purpose is to**

**Part 2: Team Work (10 minutes)**

As each person reads his or her sentence the facilitator notes the key words on the wall poster under purpose, constituency, or work. Each person notes specific words that spark your curiosity, or that give you energy. When you are done, your facilitator circles the words that seem to resonate most strongly with your team. **Part 3: Individual Work (10 minutes)**

In light of what you learned from the last 10 minutes, write a new sentence that you think can articulate a shared purpose, using some of the key words and themes you heard from others.

**Our team's shared purpose is to**

**Part 4: Team Work (10 minutes)** - We will read our sentences again and choose – or combine – one that best articulates the shared sense of your team.

## Activity: Developing Team Norms

After you have discussed the purpose of your team, it's important to understand the expectations, or norms, under which your team will operate. The activity below will guide you through an exercise to collectively develop your team's norms.

### TEAM NORMS/EXPECTATIONS (15 minutes)

Review the sample team norms below. Add, subtract or modify to create norms for your team. Be sure to include group norms on each theme below and how you will self correct if the norm is broken. (If you don't self correct the new norm will be breaking the norms.)

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**The list below is just a SAMPLE; feel free to come up with your own norms for your group**

<b>Discussion and Decision-making:</b> <i>How we will discuss options and reach decisions as a team to ensure vigorous input and debate?</i>	
<u>Always Do</u> Engage in open, honest debate Ask great questions Balance advocacy with inquiry Debate until time is up and then take a vote.	<u>Never Do</u> Engage in personal attacks Fail to listen to what others say Jump to conclusions
<b>Meeting Management:</b> <i>How will we manage meetings to respect each other's time?</i>	
<u>Always Do</u> Start on time; stay on time Be fully present throughout the meeting	<u>Never Do</u> Come to meetings unprepared Answer cell phones or do email



<b>Accountability:</b> <i>How we will delegate responsibilities for actions and activities? How will we follow through on commitments?</i>	
<u>Always Do</u> Clarify understanding Provide follow-up on action items Ask for/offer support when there is a need Weekly check-in	<u>Never Do</u> Assume you have agreement Assume tasks are getting done Commit to a task that you know  won't do
<b>How will you "self correct" if norms are not followed?</b>	

<b>Discussion and Decision-making:</b> <i>How we will discuss options and reach decisions as a team to ensure vigorous input and debate?</i>	
<u>Always Do</u>	<u>Never Do</u>
<b>Meeting Management:</b> <i>How will we manage meetings to respect each other's time?</i>	
<u>Always Do</u>	<u>Never Do</u>

<b>Accountability:</b> <i>How we will delegate responsibilities for actions and activities? How will we follow through on commitments?</i>	
<u>Always Do</u>	<u>Never Do</u>
<p><b>How will you "self correct" if norms are not followed?</b></p> <p><b>Are there other norms that you want to add that may not fall into one of the above-mentioned categories?</b></p>	

Teams work best when you have a regular, reliable time to coordinate together.



**What will your team's regular meeting time and place be?**



Groundswell | 1850 M Street NW, Suite 1150 | Washington, D.C. 20036  
202.505.3051 | [www.groundswell.org](http://www.groundswell.org) | @grndswell

## Activity: Developing Team Roles

Each member of a team will have at least one specific role. It's important for everyone to understand the responsibilities and areas of overlap for each role. This activity will help you to understand each role.

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**Understanding Team Roles** (20 min.): Review the sample team roles we suggest below. Thinking about how you should organize your next campaign event, discuss how the roles would fit together to create an interdependent leadership team. What skills would someone need to fill each role? Based on the discussion about the roles, go around the circle and ask each person to tell others what experience and talents they have and what specifically they want to learn in more detail (30 seconds each). How might these talents match up to particular roles? Are there any clear "fits"?

Team Role	Responsibilities	Interested team members & related skills / resources	Team member(s) in this Role
Team coordinator	Coordinate the work of the leadership team. Prepare for meetings and provide support for the team		
Outreach coordinator	Coordinates and manages your team's outreach activities for volunteers and homeowners		
Engagement coordinator	Coordinates and manages your		

	team's engagement activities for homeowners		
Data coordinator	Coordinates data tracking and entry for volunteer team and homeowner activity		
Logistics / hospitality coordinator	Coordinates the logistics for the team from meeting locations to food		

