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Making the Case

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THCU
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This workshop is about

- Why we make cases – to what end
- To whom
- With what evidence
- When and Where and How
- By whom
- How well

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The THCU “Making the Case” Film Festival



Warm-up Exercise

Think of opportunities you might have in the future to ‘make the case’ about a community issue:

1. Describe the opportunity:
 - a. Issue,
 - b. Who will see/hear it, and
 - c. What case you will make.
2. As you prepare, what are you unsure about, and what are you confident about?

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Warm-up Exercise

- Reflect on the questions in small groups (where you are seated) – 10 minutes.
- Be prepared to share your insights with the large group.

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Health Promotion

- Understanding of causes, solutions: medical, lifestyle, socio-environmental models
- Decision-making and other power: participation, empowerment

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Resources

- HP101 www.ohprs.ca/hp101/main.htm
- Ontario Health Promotion Resource Centres www.ohprs.ca
- Ontario Health Promotion Email Bulletin www.ohpe.ca
- The Health Communication Unit www.thcu.ca
- Centre for Health Promotion (U of T) www.utoronto.ca/chp/

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Workshop Objectives

- By the end of this workshop, participants will
- Understand key decisions to be made when “making the case,” and leading choices for each;
 - Be more able to access key resources, including online community health information; and
 - Have key skills for “making the case,” developed using scenarios about a range of community issues.

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Format of Workshop

- During the workshop, participants will
- Use lecture materials, worksheets and other practical tools;
 - Work in small groups, discussing each aspect of a “making the case” model; and
 - Learn from each other, guest speakers, and the facilitators.

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This workshop is about

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Why?

To What End?

Move the Issue Forward

- Problem: Any situation that creates difficulty or hardship
- A problem becomes an issue when it becomes a public concern.
- An issue must be defined so that it
 - Is easily understood
 - Mobilizes people to act
 - Offers practical solutions

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Issue Boundaries

- Are you making the case for health promotion in general?
- or
- Are you making the case for a specific strategy (e.g., community development)?
- or
- Are you making the case for responding to a specific health issue?

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Objective Choices

- To increase awareness, knowledge and understanding
- To increase the degree of importance attached to an issue and the perceived necessity for action (building an agenda)
- To increase activity, funding, and/or policies directed towards producing change

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To Whom?

*Identifying and Understanding
the Audience*

Identify the Audience

- Elected official
- Policy and program staff, political aides
- Government funder
- NGO funder
- Private sector funder
- Management
- Community, consumers, etc.
- Lobby groups and other organizations
- Health promotion professionals
- Media
- Other (specify)

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Types of Decision Makers

- Status-oriented decision makers are highly concerned about generating positive media coverage and/or avoiding unfavourable coverage.
- Mission-oriented decision makers hold strong views about what their department should be doing.
- Process-oriented decision makers are most concerned with serving their "clientele" or constituency.

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Understand Your Audience

- Every issue and problem has an interpretive, emotive element.
- The emotional tone largely determines how people will respond.
- Persuasion may involve much more rhetorical or emotional work than rational problem solving.

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How Does the Audience Think, Feel, Act?

Demographics

- What is the gender breakdown of your audience?
- What are their age ranges?
- What are their occupations?
- What is the income range of your audience?
- What is their range of formal education?
- What are their family situations?
- Where do your audiences live and work?
- What are some of their cultural characteristics?

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Behaviours

- What position have your audiences taken on your issue recently or in the past?
- How would you describe their current level of knowledge?
- How would you describe their current attitude toward the issue and possible solutions?
- What benefits do they/would they derive from supporting your position?
- What barriers are they facing/would they face in supporting your position?

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Lifestyle/Psychographics

- What are their fundamental values and beliefs?
- What are their interests?
- To which organizations groups do they belong?
- What are their media habits?
- What events do they attend?
- How do they spend their time and dollars?
- Who has the most influence on them professionally and personally?
- How do their friends/family/influencers perceive the issue?

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Learn More: Tips

- Use existing sources.
 - e.g., THCU's audience analysis resources
- Create new knowledge using simple and inexpensive techniques.
- Use experience and expertise but be careful about stereotypes and other biases.
- Tap into existing "groupings" of your audience to investigate key characteristics.

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Learn More con't

- Involve your intended audience in meaningful ways.
- Compare and contrast (triangulate) your findings for the best results.
- Mix quantitative and qualitative data.
- Try writing a description of each segment within your audience.
- Try to visualize and describe one imaginary individual, group of individuals (network), organization or community.

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Municipal Governments

- Fragmented – Councillors usually elected as "independent" representatives; no party discipline
- Lack of capacity for centralized leadership or policymaking
- Absence of staff intermediaries in all but the largest municipalities
- Smaller window of opportunity to implement policy changes (mandatory elections every 3 years)
- Limited taxing powers
- Mayor is the linchpin for building consensus among councillors, but is only one vote

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Municipal Decisions

- Driven by
- need to comply with provincial laws and regulations
 - desire to maintain/increase voter support
 - concerns about sustainability of local tax base
 - desire to balance need for revenues with need to address community priorities
 - desire to keep and attract community businesses
 - aspirations for power and prestige

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The most favoured policies are those that will

**Keep voter support,
Foster economic growth, and
Improve community image.**

Municipal Priorities

- First priority
 - basic housekeeping (roads, infrastructure, policing, fire protection, planning, economic development)
- Then
 - tangible assets with wide appeal which also generate revenues (e.g., arenas, parks and recreation)
- Lower priority
 - "soft" services

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Exercise: Understanding Funders

Think about the characteristics and priorities of funders you may be “making the case” to

1. Where do they stand on the issue?
2. How do they make decisions?
3. How do they generally think, feel, and act?

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Exercise: Why & To Whom

Using the selected case study

1. Clarify your objectives
2. Briefly (3 key points) describe your primary and secondary audiences:
 - Where they stand on the issue?
 - How they make decisions?
 - How they generally think, feel and act?

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Reflection

- What issues/challenges did you encounter?
- How did you work to overcome them?
- “Ah-has” and reflections
- Would you use this method/approach in a real-life situation?

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Making the Case in Action

**Guest Speaker:
Mary McGowan**

What Evidence?

Building the Case

Need Evidence For...

- Understanding the issue ("That's What"):
 - causes
 - patterns
 - history
- Demonstrating importance of the issue ("So What")
- Showing feasibility/effectiveness of the proposed response ("Now What")

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That's What

This issue is

- Clear and detailed
- Reflects consensus (not too controversial)
- Relevant to this place and time
- Not intractable

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So What

The issue is

- Timely
- Growing
- A burden in social and economic terms
- Of public concern
- Of concern to credible stakeholders

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Now What

Solutions should be

- Linked with the identified problems
- Clearly explained, straightforward and not overly complex (simple)
- Technically accurate (proven, cost effective, best practice, popular)

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Compiling Evidence

1. Find the evidence
2. Review the information
 - Quality
 - Appropriateness
3. Summarize your findings
 - Highlight main points

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Types of Information

- polling/survey data
- community health status indicators
- community story/testimonial
- policy vision documents
- case study
- evaluation report (process-outcome data)
- research report (experimental or quasi-experimental)
- cost-benefit/cost-effectiveness study
- meta-analysis (review of outcome studies)
- "best practices" syntheses and guidelines

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Information Sources

- Polling companies, news reports, websites
- Health status indicators report/web-sites
- Key community spokespersons and/or organizations
- Journals and magazines

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Effectiveness & Health Status Websites

- Ontario Health Promotion Email Bulletin Archive
 - <http://www.ohpe.ca>
- Health Promotion and Best Practices
 - <http://www.bestpractices-healthpromotion.com>
- Cost effectiveness of health promotion
 - <http://prevention-dividend.com/en/research>
- City of Toronto Ward Profiles
 - <http://app.toronto.ca/wards/jsp/wards.jsp>
- Toronto Health Profiles
 - <http://www.torontohealthprofiles.ca/dataTablesLevel2.php>

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Exercise: The What

Using the selected case study, discuss the following:

1. What claims are most important to make?
2. What types and sources of evidence for your case are available, appropriate, and of high quality?

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Reflection

- What issues/challenges did you encounter?
- How did you work to overcome them?
- “Ah-has” and reflections
- Would you use this method/approach in a real-life situations?

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Day 1 Review

- Stop?
- Start?
- Continue?

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When and Where and How?

Develop a communications plan

When

- Include activities with both high and low visibility.
- Mix the shelf-life.
- Apply the simple rule: 3 messages, 3 times, 3 different ways.
- Link with larger issues.

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Where

- Media
 - Print (reports, pamphlets)
 - Radio, television, newspapers, new media
 - Letters, mailing, petitions
 - Displays
- Interpersonal Communication
 - Conference presentations
 - Deputations, consultations
 - Meetings
- Events
 - Community-wide demonstrations, rallies
 - Specific group

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How

- Before
- Beginning
- Middle
- End
- After

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Personal Presentations

- Intro – “tell them what you are going to tell them”
 - Attention grabber (prop, anecdote, etc)
 - Transition line (relate opening to theme)
 - Announce three-part plan
- Body of presentation – “tell them”
 - Three main points
- Close – “tell them you told them”
 - Summary of major points
 - Strong closing
 - Call to action

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Before the Meeting

- No more than three people present
- Clarify how much time you have: NEVER go overtime.

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During the Meeting

- Use prepared briefing notes and have extra copies available for participants.
- Thank meeting sponsors for opportunity to present.

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After the Meeting

- Debrief immediately.
- Identify and assign tasks arising.
- Send follow-up letter within one week, acknowledging meeting and any commitments made.

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Exercise: How

1. Brainstorm about “how” you would go about “making the case” by way of
 - a. community event
 - b. report
2. What would you do before, during and after the community event/report?

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Exercise: How Continued

- Reflect on the questions in small groups (as assigned) – 15 minutes.
- Identify the 3 most important things to do to support your case/campaign
 - Before,
 - During, and
 - After.
- Record on flip chart.
- Be prepared to share highlights.

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By Whom?

*Organizational Identity,
Selecting Spokespersons*

Identity

- Defines how people will perceive your project
- Communicates who you are, how you do business, and your intended relationship with the subject and the audience
- Your project will have an identity whether you intend it or not.

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Key Identity Elements

- How you act
- Vision
- Mission
- Positioning statement or copy platform
- Name
- Logo
- Images
- Other considerations

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Typical Categories of Spokespeople

- **Celebrity** (famous athlete or entertainer)
- **Public official** (government leader or agency director)
- **Expert specialist** (doctor or researcher)
- **Organization leader** (hospital administrator or executive),
- **Professional performer**
- **Ordinary real person**
- **Specially experienced person** (victim, survivor, or successful role model)
- **Unique character** (animated, anthropomorphic, or costumed).

Above information presented by Dr. Chuck Atkin at THCU's 2000 Special Topics workshop.

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Selection of Messengers

- Consider which component of influence model needs a boost. For example
 - celebrities help draw attention to a dull topic,
 - experts enhance response efficacy,
 - ordinary people heighten self-efficacy,
 - victims convey the severity of harmful outcomes, and
 - victims who share similar characteristics of the audience augment susceptibility.

Atkin (1994) provides an elaborate discussion of strengths and weaknesses of various types of messengers. Above information presented by Dr. Chuck Atkin at THCU's 2000 Special Topics workshop.

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Exercise: When/Where/How/By Whom

- Using the selected case study
- Identify appropriate channels/vehicles for reaching your audience
- Identify appropriate spokespeople and other ways to enhance identity

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Reflection

- What issues/challenges did you encounter?
- How did you work to overcome them?
- “Ah-has” and reflections
- Would you use this method/approach in a real-life situation?

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Making the Case in Action

**Guest Speaker:
Angela Robertson**

How Well?

Evaluation, Reviewing the Case

Evaluation/ Reviewing the Case

- Formative (assessment of planning)
- Process (assessment of implementation)
- Summative (assessment of results)

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Evaluation Questions

- Formative
 - What does your audience think about your priority issue?
 - What is the most effective way to reach your audience?
- Process
 - What happened?
 - Was the case implemented as planned? If not, what changes were made?
- Summative
 - Was there change related to objectives (e.g., awareness, knowledge, attitudes, actions, policies initiated or revised)?

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Exercise: Case Preparation

- Decide whether to present your work from exercises 1–3.
- If you wish to do so, decide upon a method, e.g., role play a presentation or present an outline of a report or letter.
- Your group has about 40 minutes to prepare.

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Making the Case in Action

**Guest Speaker:
Andrew MacDonald**

Exercise: Demonstration

- Set the stage for us:
 - Who is who
 - What will happen
- Do it!
- After presenting, share your self-assessment and invite feedback.

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Reflection

- Any surprises?
- What are the most important learnings/insights that you will take away from this workshop?
- Is there anything that you will plan to do differently?

Disclaimer

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