

HEARTWIRED

HUMAN BEHAVIOR, STRATEGIC OPINION RESEARCH
AND THE AUDACIOUS PURSUIT OF SOCIAL CHANGE

A STRATEGY GUIDE FOR CHANGE-MAKERS



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wonder
strategies for good

GOODWIN SIMON
STRATEGIC RESEARCH

Made possible with support from the David and Lucile Packard Foundation



GOODWIN SIMON STRATEGIC RESEARCH

Goodwin Simon Strategic Research (GSSR) is a national public opinion research firm with special expertise in conducting research on emotionally complex, socially controversial issues. GSSR's cutting-edge approach is built on decades of experience in polling, social and political marketing, policy analysis and communications, and rooted in the latest research on neuroscience, emotion, psychology, cognitive linguistics and narrative theory. This unique methodology is used to unpack underlying attitudes and emotional reactions that impact behavior and decision-making and to develop effective message frameworks that enable deep attitudinal change. Amy Simon, John Whaley, Rebekah Orr and Eric Cameron of GSSR all contributed their thought leadership and writing to this strategy guide.



WONDER: STRATEGIES FOR GOOD

Do good — and do it as quickly as possible. That is the mantra that drives Wonder. We are a network of experts in messaging, storytelling, psychology and public opinion research. We use audience insights to develop storytelling and messaging strategies that shape attitudes and influence the behavior of your target audiences. Wonder strategists have partnered with change-makers to make progress on some of the most pressing issues of the day — from advancing the freedom to marry for same-sex couples to making medical aid-in-dying a legal option for terminally ill people. Robert Pérez and Jessica Nusbaum of Wonder: Strategies for Good both contributed their insights, experience and writing to this strategy guide.



THE DAVID AND LUCILE PACKARD FOUNDATION

For more than 50 years, the David and Lucile Packard Foundation has worked with partners around the world to improve the lives of children, families and communities — and to restore and protect our planet. We are a family foundation guided by the enduring business philosophy and personal values of Lucile and David, whose innovative approach to management helped transform a small electronics shop in their garage into one of the world's leading technology companies. Their approach to business and community participation guides our philanthropy: We invest in leaders and institutions, collaborate with them to identify the most effective solutions and give them freedom and support to best reach their goals. The values of the foundation reflect the personal values of Lucile — who spent her life as a volunteer in the community, often on efforts aimed at improving the lives of children — and David — who believed in the power of science to improve the human condition and restore the health of the planet. Today, their children and grandchildren continue to help guide the foundation. Justin Cole Adams of the David and Lucile Packard Foundation contributed his time and smart thinking to this strategy guide. For information about the David and Lucile Packard Foundation, please email comm@packard.org.



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heartwired

adjective heart•wired |'härt-wī(-ə)rd|

: having circuits and connections between your emotions, values, beliefs, identity and lived experiences



WELCOME

FROM THE DAVID AND LUCILE PACKARD FOUNDATION

Advancing positive and lasting social change in a world that grows more complex each day is hard work. The explosion of ways we communicate with each other has made this work easier...and at the same time harder. While it's easier than ever to reach people, it's now often harder to truly connect with them. Understanding how we break through to our most critical audiences — and developing messages that respectfully and authentically connect with their lived experiences — has become essential to inspiring people to come together to create this change.

The good news is that the behavioral and brain sciences are also evolving rapidly. This is helping to give us a better understanding of how we relate to and interact with each other and how people process information and emotion. Better understanding this has been paramount in the development of new public opinion and audience research tools that have the power to reveal, with unprecedented depth and clarity, how our audiences think, feel and make decisions.

For anyone working to advance social change — particularly those struggling to move people who are seemingly unmovable on an issue or who are facing intense opposition to the changes they seek — this evolution is exciting stuff. Having more effective, research-based communication tools and methods means that:

- Instead of using polls and other opinion research only to record the current state of public opinion and make a news splash for a day, advocates could reshape those tools to get insights into what audiences actually think and feel about an issue. These insights could profoundly shape advocates' long-term strategies and move them more quickly toward the change they seek to create in the world.
- By improving and expanding the current approaches to background research, organizations could collaborate to leverage and build on one another's work and knowledge and accelerate progress for their entire movement.
- By expanding their research toolbox and deepening their understanding of their target audiences, we believe our grantees, partners and peers could amplify their impact.

We recognize that learning about and keeping up with all of these new methods and tools — much less figuring out how to use them to advance your goals — can be a full-time job. That's why we decided to invite a few folks who do just that as their full-time job to share their experience and wisdom with you.

The research and communication strategists at Goodwin Simon Strategic Research and Wonder: Strategies for Good have spent decades on the front lines of social and environmental change, understanding what it will take to make change happen and then innovating new, integrated approaches to audience research, storytelling and persuasion communication to make it happen. Their work has supported historic wins, from the freedom to marry for same-sex couples to making medical aid-in-dying a legal option for terminally ill people.

In this strategy guide, they share stories, tools and some secrets of success from their own work and from other leaders in the field. We hope you connect with the examples and strategic approaches they share in this guide and that you find a valuable template for success for your own work.

Justin C. Adams

Communications Officer

The David and Lucile Packard Foundation

This strategy guide shares stories, tools and some secrets of success. We hope the strategic approaches shared in this guide provide you with a valuable template for success for your own work.



DEDICATION



...Iconoclasts are able to do things that others say can't be done, because iconoclasts perceive things differently than other people. This difference in perception plays out in the initial stages of an idea. It plays out in how they manage their fears, and it manifests in how they pitch their ideas to the masses of non-iconoclasts.

GREGORY BERNIS

ICONOCLAST: A NEUROSCIENTIST REVEALS HOW TO THINK DIFFERENTLY



Heartwired is dedicated to the iconoclastic funders, advocates, activists and change-makers who see the possible, where others see the impossible. Then, they dare to make it so.

Funders and non-profit leaders understandably feel more comfortable investing in familiar approaches. Yet, there are times when this caution can be self-defeating — when the known approaches have been insufficient to create real change.

This guide is a tribute to those visionary and iconoclastic funders and non-profit leaders who have been willing and able to overcome the fear of failure and venture to take a risk on new ways to accelerate change.

Special thanks to the David and Lucile Packard Foundation for being the iconoclastic funder of this guide and supporting our iconoclastic approach to accelerating social change.

We would also like to give our heartfelt thanks to our dear and frequent collaborator, Dr. Phyllis Watts, who has helped us to understand that human beings have a powerful desire to see themselves as good, and how, as change-makers, we can leverage that understanding and use research-driven communications to speak to the better angels of our nature.



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IS HEARTWIRED FOR YOU?

- ☐ Are you a change-maker?
- ☐ Do you feel frustrated that the changes you are seeking to make in the world are too slow in coming?
- ☐ Do you need to move an audience that's going to be really tough to persuade?
- ☐ Do you wonder if there are new or different research tools that would better tell you what you most need to know to effect change?

If you answered “yes” to any of these questions, then this strategy guide is for you.

Human decision-making is influenced by how people are heartwired — the mind circuits and connections that tie together their emotions, identity, values, beliefs and lived experiences. Heartwired is designed to help you put this deeper understanding to work in your efforts to create social change.

HOW TO USE THIS GUIDE

HEARTWIRED CASE STUDIES: Learn how a heartwired approach to research and communications has been transformative for change-makers on a diverse range of issues.

HEARTWIRED FACTORS: Learn how values, beliefs, emotions, identity and lived experiences are core to conducting heartwired research and creating change.

CONCEPT CATALYSTS: Ground yourself in key concepts and ideas that have helped shape the heartwired approach to research.

THE HEARTWIRED MAP: Determine where you are in your own cycle of creating the change you seek to make in the world.

ONLINE TOOLBOX: Refer to the online Toolbox to go more in-depth about specific research methodologies at heartwiredforchange.com/toolbox



BRAIN BOOKS & GEEK READS: Dig deeper into the concepts we describe — and many other valuable analyses of how human beings are heartwired — by reviewing our brief recommended reading list or referring to the lengthier annotated list at heartwiredforchange.com/geekreads



HEARTWIRED MESSAGES: Check out examples of heartwired messaging in action at heartwiredforchange.com/messaging





CONCEPT CATALYSTS

In our work as researchers and communication strategists, we have drawn great inspiration from the ideas and theories of others. Throughout Heartwired, we refer to those ideas as Concept Catalysts.

French mathematician Henri Poincaré likened breakthrough moments to a theory of atoms colliding with one another after a period of dormancy:

During the complete repose of the mind, these atoms are motionless; they are, so to speak, hooked to the wall; so this complete rest may be indefinitely prolonged without the atoms meeting, and consequently without any combination between them. On the other hand, during a period of apparent rest and unconscious work, certain of them are detached from the wall and put in motion. They flash in every direction through the space...where they are enclosed as would, for example, a swarm of gnats...Then their mutual impacts may produce new combinations. What is the role of the preliminary conscious work? It is evidently to mobilize certain of these atoms, to unhook them from the wall and put them in swing. We think we have done no good, because we have moved these elements a thousand different ways in seeking to assemble them, and have found no satisfactory aggregate. But, after this shaking-up imposed upon them by our will, these atoms do not return to their primitive rest. They freely continue their dance.

For us, the inspired thinking of great minds from diverse fields has had a catalytic effect — putting atoms in motion that often collide with our own thinking and experiences. Those Concept Catalysts have helped us to see the world in new ways and have become foundational to our work. In each chapter, we spotlight one or more Concept Catalyst at play in each of the Heartwired case studies that we feature.

Here are some of the Concept Catalysts you'll read about in this guide:

Upstairs Brain, Downstairs Brain: How our understanding of the brain shapes research and strategic communications.

Diffusion of Innovations: How to get your change to spread through a population.

The Adjacent Possible: How to expand the possibilities for change in the world.

Change from the Inside Out: How societal change starts inside of people.



INTRODUCTION

THE HEARTWIRED ANIMAL



In this guide, we analyze how change-makers have leveraged a heartwired understanding of their audiences to accelerate change on their issue. Then we show you how to apply the heartwired approach to mapping your own social change. With Heartwired, we hope to better equip you to generate deep and lasting change.

Human beings are heartwired.

Much has been written in the last decade about how human brains are hardwired — a set of circuits and connections that govern how people make decisions. Advances in the neurological and social sciences have created a paradigm shift in our understanding of how the human brain processes emotion, logic and primal or gut reactions, and how those brain processes influence people's decision-making.

The ways people are heartwired further shape our attitudes and behaviors on the pressing issues of the day. Just as there is a complex network of circuits that wire people's brains and influence people's impulses, there's also an elaborate psycho-social circuit board that connects people's **emotions, values, beliefs, identity and lived experiences**. In other words, human decision-making is influenced by how people are heartwired — the mind circuits and connections that tie together their emotions, identity, values, beliefs and lived experiences.



Photo Credit: Dboybaker via Flickr

As research and communication geeks with real-world experience generating social change, our teams at Goodwin Simon Strategic Research and Wonder: Strategies for Good have examined how change-makers have leveraged a heartwired understanding of their target audiences to hasten a tipping point on their issues.



We are not enemies, but friends. We must not be enemies. Though passion may have strained, it must not break our bonds of affection. The mystic chords of memory, stretching from every battlefield and patriot grave to every living heart and hearthstone all over this broad land, will yet swell the chorus of the Union, when again touched, as surely they will be, by the better angels of our nature.

PRESIDENT ABRAHAM LINCOLN, FIRST INAUGURAL ADDRESS



Consider the dramatic changes in Americans' attitudes and behaviors regarding the freedom to marry for same-sex couples.

By the end of 2008, opponents of marriage for same-sex couples had a string of over 30 victories at the ballot box. Beginning in 2009, Amy Simon and a team of researchers and advocates undertook extensive qualitative and quantitative research, seeking pathways forward to reverse the string of losses at the ballot box. As *The Atlantic Monthly* noted, Simon and colleagues began to see the deep conflict that many voters experienced about the topic of marriage for same-sex couples.

Simon's sessions could be wrenching. A participant in one focus group had been screened as a soft opponent of gay marriage, yet she spent half an hour sounding very supportive. She talked enthusiastically about her affection for the gay people in her daily life, including gay coworkers and a lesbian sister-in-law. "Finally, I said to her, 'When we called you, you said you were undecided or leaning against [gay marriage]. Did we make a mistake?'" Simon recalled. "She looked at me and she stopped, and she said, 'No, no, no.' Then she started crying, and she said, 'I want to be for this. But I'm afraid I'm going to burn in hell.'"

Simon found many voters were struggling as painfully as that woman with the issue of gay marriage. Their "undecided" status didn't come from a lack of feelings on the issue. They were powerfully conflicted, caught between two deep-seated sentiments: On the one hand, a desire to be fair and compassionate toward their fellow man; on the other, a loyalty to what they saw as the ironclad teachings of religion, tradition, or culture.

This woman's identity as a Christian, and her beliefs about salvation and marriage as a religious covenant between a man and a woman, led her to oppose marriage for same-sex couples. However, her lived experience of caring deeply for her lesbian sister-in-law and close gay and lesbian friends provided a powerful motivation to want to do right by them.

A heartwired research approach recognizes that people's internal conflicts are actually doors of opportunity to facilitate internal change within the audiences we seek to persuade.

For change-makers, the ability to make progress on a tough social issue requires an understanding of just how a target audience is heartwired to think, feel and

respond to your issue. This understanding enables you to see the range of possibilities for rewiring those circuits and connections among those audiences.

In the coming chapters, we analyze efforts in which a heartwired approach to audience research has led to breakthrough insights and transformative change. From the historic campaign to win the freedom to marry for same-sex couples to successful efforts to reform marijuana laws, common lessons emerge.

A heartwired research approach recognizes that people's internal conflicts are actually doors of opportunity to facilitate internal change within the audiences we seek to persuade.

These social-change case studies show how change agents have used heartwired research to map the strategic terrain. Some have identified gateways to persuasion that previously had been closed to them. Others have pinpointed the barriers to persuasion that were rooted in their audience's **values, beliefs, emotions, identities and lived experiences**, which created resistance to change. Their research helped to plot the interim changes needed to lay the groundwork necessary for even greater change down the line.

In every case, strategic opinion research illuminated a new path forward in the audacious pursuit of social change.

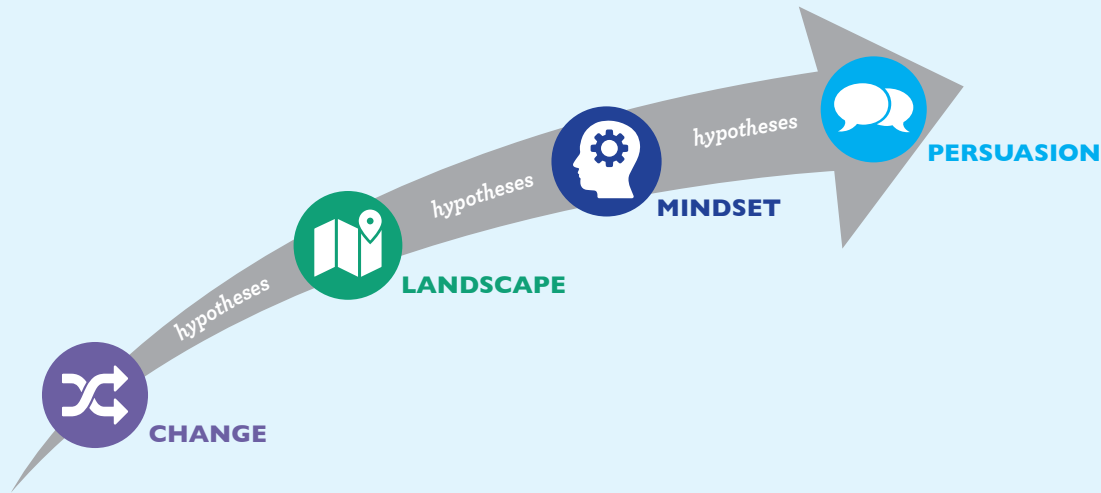
While the ideas in this strategy guide are shaped by our three decades of work as advocates, strategists and researchers, those ideas have come together here because of the contributions and thinking of many — what Steven Johnson, author of *Where Good Ideas Come From*, calls "liquid networks." According to Johnson, "every idea is fundamentally a network of ideas." Liquid networks require a diversity of experiences and expertise. It's the active interchange of insights and ideas that so often finally yields the big breakthrough.

Our heartwired thinking, as well as our work, have been inspired by the ideas, best practices, books and successes of many others.



THE HEARTWIRED MAP

Using Strategic Research to Accelerate Social Change



Later in this guide, we outline how to map out your heartwired research strategy to accelerate social change.

Whether you are conducting a single survey or launching a large-scale social change campaign like marriage for same-sex couples that may take years and require deploying multiple research methods, applying the process outlined below will help ensure that the resulting research findings and communication recommendations best support your objectives.

This research process includes four phases that are interconnected and ongoing. Each of the four research phases are guided by the strategic questions below:

CHANGE: What is the specific change you want to enact in the world?

The freedom-to-marry movement came together and developed the 10/10/10/20 framework as their vision of change, which they translated as: In the next 20 years, winning equal marriage rights in 10 states; civil unions in 10 states; relationship recognition for same-sex couples in 10 states; and at least some pro-equality organizing in the final 20 states.

LANDSCAPE: What is the current landscape, or the playing field on which you have to compete, to create the change you seek — and what is already known about it?

In research to understand the attitudes of American millennials toward ocean conservation, the research

team first conducted an extensive review of existing public opinion research to ensure their work would build on, rather than simply repeat, polling that had already been done.

MINDSET: What is the mindset of the audiences you need to persuade?

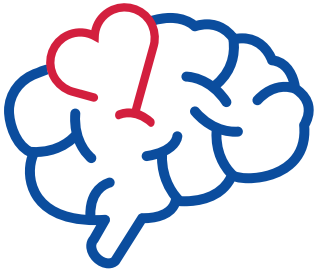
Research for the Robert Wood Johnson Foundation explored conscious and unconscious biases as a way to understand how to build support for programs and policies to improve the health and success of young men of color.

PERSUASION: How do you translate your new heartwired understanding of your target audiences to develop effective persuasion strategies?

Mississippians for Healthy Families was able to defeat an extreme anti-abortion ballot measure in the state by communicating the message that “it was perfectly acceptable to be pro-life and to vote against Initiative 26.”

By mapping your change strategy, as the advocates, researchers and strategists featured in this guide have done, it is possible to accelerate momentum on your issue. Doing so gives you a bird’s-eye view of the world in which you are seeking to create change, and can transform how you approach your work once you’re back on the ground working to change hearts and minds.





FIVE HEARTWIRED FACTORS

The heartwired approach to research focuses on the ways that emotion, values, beliefs, identity and lived experiences combine, and often collide, to shape people's attitudes and behaviors. Here's how each of the heartwired factors influence people's thinking and decision-making.

EMOTIONS: The feelings that human beings have in response to the stimuli both within and around us are complex. Our emotions typically drive our behavior. In his book, *The Happiness Hypothesis*, psychologist Jonathan Haidt uses the analogy of an elephant and a rider to describe how our emotional brain works with, and often competes with, our rational brain. He writes, "Like a rider on the back of an elephant, the conscious, reasoning part of the mind has only limited control of what the elephant does." Our emotions work to prioritize different concerns — especially when we feel threatened and need to make a split second decision (Stay and fight the big bear? Or run like crazy?!). When we have more time to consider different priorities, our rational brain has the capacity to guide the elephant, though the elephant (emotions) can still win out over the rider (rational thought).

IDENTITY: Self-identity is how a person sees himself or herself in relation to the world around them. It is an incredibly powerful factor in how we experience the world. We are all driven to make decisions that align with our sense of self. When we don't, we experience uncomfortable cognitive dissonance. While each of us has a single identity, that identity incorporates many facets such as gender, race, ethnicity, profession, family and social roles, political affiliation and faith as well as traits such as being hard-working, fair-minded, educated and more. Each of us places different weight upon each facet of our identity, and that relative weight can change based on circumstances and on the moment we are at in our lives. For example, someone may see herself as a young woman, sister and daughter; when she marries and has children, she also sees herself as a wife and mother. Those facets of our identity that we prioritize have greater impact on our decision-making. Internal conflict on social issues is often the result of a moral tug of war between different facets of a person's identity.

LIVED EXPERIENCES: The events and relationships a person experiences in their life combine with the meaning that they assign to those experiences to shape how they think about social issues. The way we interpret and remember events — the narrative we construct around them — is just as important as what actually happened. Subgroups (parents, immigrants, women, African Americans) can share common, even if slightly different, lived experiences. Exploring and understanding those lived experiences is key to effective messaging strategies.

VALUES: Values are ideals that individuals hold about what is good or bad, right or wrong, appropriate or inappropriate. Values influence emotional reactions, attitudes, beliefs and behaviors. Values are often shared broadly within a culture or community. A person's values help them to make meaning in their lives and weigh the importance of their actions and decisions. When a person feels that an issue position is aligned with their values, they are able to feel a sense of ease and contentment. If those values are contradicted, people experience a sense of dissonance and incongruence, which interferes with their capacity to support that issue position.

BELIEFS: Beliefs are ideas that people hold to be true. People make their way through life building a set of assumptions about how the world works. When we have a lot of experience with something — whether that be a group of people (immigrants or LGBT people) or a topic (healthcare) — our beliefs are deeper and more nuanced. When we have little to no experience with something (the science of climate change), we tend to fill in the knowledge gaps based on isolated experiences, the little information that has come our way or by spontaneously constructing analogies to things that feel similar to the thing we are pondering. Whether we have deep or scant knowledge, our beliefs are further shaped by our identity, our lived experience and our values. In other words, facts alone do not shape beliefs.



CHAPTER I

UNCOVERING THE CONFLICT



In this chapter, you'll learn how advocates for equal marriage rights used heartwired research to develop effective persuasion strategies. We talk about why storytelling is singularly powerful in shaping attitudes and influencing behaviors. We then outline the heartwired approach to strategic research and social change.

WINNING THE FREEDOM TO MARRY FOR SAME-SEX COUPLES: A HEARTWIRED CASE STUDY

It's a case study in strategic focus and inspired insight. It's a history lesson in coordination and collective action.

Ultimately, it's a tale of dogged perseverance. In the midst of heartbreaking defeats and against seemingly impossible odds, advocates for the freedom to marry stuck with it and won.

You can tell the story of this movement's win from many different perspectives — building it around a charismatic figure or institution on whose shoulders victory rests. There are many individuals and organizations whose vision and foresight certainly deserve praise. In fact, many of those stories have already been written by journalists, academics, philanthropists and those who helped lead the fight.



Stories featuring same-sex couples along with their extended families hastened a tipping point on the freedom to marry. Photo used with permission of Our Family Coalition.

This case study is focused on how the freedom-to-marry movement worked together to use research to map the mindsets of their audience, develop persuasion strategies and ultimately achieve transformative change.



Read more about the fight for the freedom to marry: *Winning Marriage* by Marc Solomon; *From the Closet to the Altar: Courts, Backlash, and the Struggle for Same-Sex Marriage* by Michael J. Klarman; *Engines of Liberty: The Power of Citizen Activists to Make Constitutional Law* by David Cole; “Winning Marriage Equality,” by Matt Foreman in *Washington Monthly*; “How Gay Marriage Became a Constitutional Right” and “The Marriage Plot” by Molly Ball in *The Atlantic*. More are in the works. For the latest additions to our reading list, visit heartwiredforchange.com/geekreads.



FOCUSED ON CHANGE

In late 2003, the Massachusetts Supreme Court made the Bay State the first in the nation to grant equal marriage rights to same-sex couples. The ruling whipped up a frenzy of opposition from cultural conservatives. Barely two months after the Massachusetts decision, President George W. Bush used his State of the Union Address to advocate for an amendment to the U.S. Constitution to define marriage as a union between a man and a woman.

In 2004, a group of foundations that had funded lesbian, gay, bisexual and transgender (LGBT) causes came together to form the Civil Marriage Collaborative, housed at the Proteus Fund, to advance equal marriage rights in the United States.

The individual foundations that joined the Civil Marriage Collaborative recognized that legal victories — like the Massachusetts decision — would be short-lived if the movement could not defend them at the ballot box. Election results in 2004 demonstrated how difficult the road ahead would be. During that year, voters in 13 states passed ballot measures banning the freedom to marry by wide margins — often by 40 percentage points or more.

A few months after the crushing election results, national LGBT leaders, including members of the Civil Marriage Collaborative, convened in early 2005 to chart a path forward.

In their case study, the Proteus Fund writes, “There had never been a meeting like it.” That meeting ultimately led to a shared framework for change — referred to as the 10/10/10/20 vision.

The Proteus Fund described the 10/10/10/20 vision in this way:

...a plan to move the nation to a “tipping point” on marriage within 20 years by securing marriage equality in 10 states, getting 10 others states to embrace civil unions, another 10 states with some form of legal recognition of same-sex couples, and at least some pro-equality organizing in the remaining 20 states.

This vision for change — specific, measurable, time-bound — was a critical moment for the movement. It gave funders and advocates alike a framework to guide their work with an explicit focus on proactive, state-based work.

SETBACKS ON THE ROAD TO UNDERSTANDING

Of course, social change is never easy. The new vision was successful at focusing funding and advocacy efforts.

But the movement still lacked a critical understanding of voter attitudes — let alone a strategy to shift those attitudes.

Between 2005 and 2006, voters in nine more states amended their constitutions to ban equal marriage rights. A 2005 survey funded by the Gill Foundation began to shed some light on the string of election losses: 57% of Americans believed that gay people did not share their basic values.

“By exploiting fear and ignorance about gay people, opponents had real success in claiming that marriage equality would damage the institution of marriage and harm kids,” said Matt Foreman, a program director at the Evelyn and Walter Haas, Jr. Fund, which helped found the Civil Marriage Collaborative and ultimately invested \$39 million in the marriage struggle.

It wasn’t until 2009, after the heartbreaking losses in California in 2008 with Proposition 8 and in Maine in



“Hearts & Minds,” as told by the Proteus Fund, chronicles the compelling story of the role that the Civil Marriage Collaborative and philanthropy played in helping to win the freedom to marry. heartwiredforchange.com/geekreads.

HEARTS & MINDS

The untold story of how philanthropy and the Civil Marriage Collaborative helped America embrace marriage equality





Photo used with permission of Our Family Coalition.

2009 with Question 1, that the movement began to invest seriously in the type of public opinion research that went deep in exploring people's beliefs, values and lived experiences.

"The movement knew it wasn't connecting with the public and began investing in deep psychographic research to determine what was really going on inside people's heads," said Foreman.

"The only way to achieve a robust victory and defend it was to take on the biggest challenge facing our movement: changing the hearts and minds of Americans about the place of LGBT people in our society," said Paul Di Donato, director of the Civil Marriage Collaborative. "That's when we began to make the level and specific types of investments needed to help us genuinely understand what was really going on inside people's heads."

"Even our initial investment in this type of deep research — which involved **focus groups**, multi-hour interviews with carefully selected individuals and developing and testing dozens of different approaches — cost 10 times more than a typical California statewide poll, for example," said Di Donato. "That doesn't even factor in the expenses of further research and testing. Finding the money to pay for this research was a significant challenge, but in the end foundations and individual donors stepped up."

Researchers used a variety of research methods, including the **applied psychological approach**, pioneered by Dr. Phyllis Watts, a clinical and social psychologist who advises campaigns and progressive causes on messaging and audience research. Watts leads **psychological interviews** with the target audiences and observes focus groups.

"We began to see that many voters had a flawed mental template of gay people and same-sex relationships," said Watts.

A **mental template** is a set of images and associations that people have with something — or someone — they encounter out in the world. It unconsciously impacts their emotional reactions to others.

As Watts noted, voters had a flawed mental template of gay people. When they thought about gay people's relationships, many thought those relationships were based on sex, unlike heterosexual relationships, which voters felt were based on love, family and partnership.

A mental template is a set of images and associations that people have with something — or someone — they encounter out in the world. It unconsciously impacts their emotional reactions to others.

The movement also worked with **cognitive linguists** to study the words and metaphors that voters used to talk about the issue. Movement advocates were no strangers to the hyperbolic framework on the right — warning of the downfall of society. It was easy to dismiss these slippery-slope arguments as the rhetoric of fringe activists.

A closer examination, however, allowed the movement to see how these metaphors impacted the ways in which moderate, conflicted voters came to see not just gay people, but the importance of marriage. These voters talked about the importance of marriage in "building families" and "strengthening communities" — all metaphors that suggest human connection. Voters saw gay people as disconnected from their families.

RESEARCH METHODOLOGIES: APPLIED PSYCHOLOGICAL APPROACH

The **applied psychological approach** focuses on understanding target audiences on a deep, psychological level, exploring how issues align with their **identity, values** and **lived experiences**, and on creating change from the inside-out rather than the outside-in. To learn more, see "Concept Catalyst: Change that Happens from the Inside Out."



Voters believed that gay people came out, moved away and left their families behind. According to cognitive linguistic analysts who advised the movement, if heterosexual relationships were based on family and connection, gay people were seen as free-floating atoms who were disconnected from family and from society.

The psychological and cognitive linguistic research aligned with what qualitative researchers were learning in **dyad interviews** with husband/wife, mother/daughter and father/son pairs as well as **triad** and **quad interviews** made up of three- and four-person friendship circles. A common question was raised during these interviews: “Why do gay people want to get married?”

It seemed like an odd question with an obvious answer: Gay couples want to get married for the same reason that straight couples want to marry. When researchers explored these themes further during these interviews, they learned that voters believe straight people get married for a variety of reasons including love, but also the ability to start a family as well as to meet the expectations of their parents.

But that’s not how these voters thought about gay relationships. After all, the movement had been communicating that gay couples wanted to marry because they wanted the rights and responsibilities that come with marriage — not focusing on getting married because of love and commitment. Furthermore, if voters’ flawed mental templates lead them to believe that gay relationships are primarily sexual (not romantic), think (incorrectly) that gay couples don’t start their own families and see gay people as disconnected from their own parents (whom they imagine have rejected them), then it would seem that there would be no compelling reason for them to get married. Civil unions or some other legal equivalent would meet the needs of gay couples for legal rights and protections.

Finally, what emerged was a far more nuanced picture of the target voter. When thinking about the voters who cast ballots against equal marriage rights, LGBT advocates and activists tended to think in terms of “hate” and “bigots.” Researchers found many voters who were deeply conflicted. They had coworkers, friends and relatives who were gay whom they liked. Often their conflict stemmed from caring about these people, but being raised in a church where they were taught that being gay was a sin.

LOVE, COMMITMENT, MARRIAGE: A NEW WAY TO TALK ABOUT THE FREEDOM TO MARRY

With a deeper understanding of the voter mindset, state advocates began public education efforts in 2011 and 2012 to shift how voters related to gay people and how they thought about equal marriage rights.

A big shift came in the approach to persuasion. Gone were messages focused on discrimination and rights. Rather than politicians, advocates elevated everyday people as messengers — especially the long-time married parents and grandparents of gay and lesbian people.

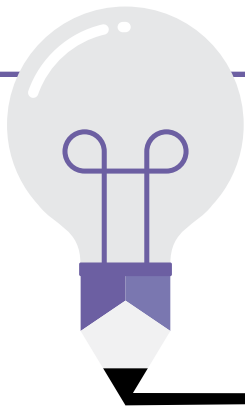
Rather than a fact-based approach that talked about “discrimination” and “the state constitution,” messengers shared personal stories of love, marriage and commitment. A beautiful ad featured Harlan Gardner, an octogenarian grandfather from Machias, Maine, who has been married to his wife, Dottie, for over 50 years.

RESEARCH METHODOLOGIES: DYADS, TRIADS, AND QUADS

Dyads, triads and quads are a type of small focus group that help researchers understand how friends or family members talk with each other about complex issues. They provide an opportunity to observe and probe people who have differing opinions. They allow researchers to develop an understanding of **influence patterns** — the ways in which social interactions, within a network of individuals, help ideas to spread.

Unlike traditional focus groups, where participants typically do not know each other, these groups are conducted with pairs of people (dyads) who know each other well — such as a husband and wife or mother and daughter — or small groups of three or four friends, relatives or coworkers (triads or quads). An initial “core” respondent is first recruited and then provided with a financial incentive to seek out his/her friends to participate.





Storytelling: Perfectly Synced to the Heartwired Approach

Stories are uniquely human. No other animal on the planet is wired for story in the way that homo sapiens are. Stories are also uniquely powerful at shaping attitudes and influencing behaviors on tough social issues. In fact, developing the right storytelling strategy is one of the most important strategic tools in your heartwired strategy.

WE WILL NEVER WIN ON OUR ISSUES WITH FACTS ALONE.

The right story facilitates what social scientists refer to as **narrative transport**, when people are so caught up in a narrative that they feel they are a part of it or strongly relate to the story's characters or experiences. Being

transported into a story means you are deeply immersed in the narrative. When story consumers have the deepest immersive experience, they are most likely to empathize with a character in a story — and see the world through their eyes.



An August 2008 article in *Scientific American* describes a 2004 study by psychologist Melanie C. Green on how lived experiences influence the depth at which narrative transport takes place:

Volunteers read a short story about a gay man attending his college fraternity's reunion. Those who had friends or family members who were homosexual reported higher transportation, and they also perceived the story events, settings and characters to be more realistic. Transportation was also deeper for participants with past experiences in fraternities or sororities. "Familiarity helps, and a character to identify with helps," Green explains.



In his 2012 book, *The Storytelling Animal: How Stories Make Us Human*, Jonathan Gottschall describes this phenomenon:

When we read nonfiction, we read with our shields up. We are critical and skeptical. But when we are absorbed in a story, we drop our intellectual guard. We are moved emotionally, and this seems to leave us defenseless.

In other words, we will never win on our issues with facts alone.

At the same time, untested stories are not a panacea. What Green's research and our own research have shown is that target audiences are most likely to be persuaded by the *right* story — a heartwired story. Heartwired stories feature familiar and relatable characters and create a shared sense of **identity, lived experiences, values** and **beliefs**. Therefore, developing stories that are most effective as persuasion tools requires first understanding the identity, lived experiences, values and beliefs of your target persuasion audience.



The ad opens with the entire family at the breakfast table, with Harlan explaining that “we have four generations of our family sitting around this table.”

In explaining why he wants his granddaughter, Katie, to be able to marry her partner, Alex, Harlan says, “Marriage is too precious a thing not to share.” This is an example of heartwired messaging — a respected messenger expressing shared **values** with his audience regarding marriage, which in turn helps them to manage their conflict about marriage as a religious institution.

To reach “conflicted friends and family,” an ad in Maryland featured Todd who explains that “everyone knows someone who is gay.”

“Maybe they’re across the table from you at Thanksgiving,” Todd adds. “Maybe they’re playing third for the office softball team.”



The ad concludes with Todd saying, “I’m not gonna be the guy that looks his friends in the eye and tells them I voted against treating them fairly.” This is another example of a heartwired message. The ad features a relatable messenger sharing his **lived experience** of having close friends or family who are gay and expressing shared **values** about not wanting to harm those friends or family by voting against allowing marriage for same-sex couples.

Including shared values and lived experiences facilitates persuasion.

Given that faith was a prime motivator to vote against the freedom to marry, the movement began running ads featuring Christian messengers delivering Christian messages. This approach was important as so many people in the target audience hold being Christian as a core part of their **identity**. Particularly effective were journey stories where messengers shared their change of heart about the freedom to marry.



In one ad, Pastor Michael Gray, a Methodist minister, shares that he “really struggled through this issue of same-sex marriage.”

His wife, Robyn, adds, “It weighed heavy on our hearts. We did pray about it.”

Using a powerful example of heartwired messaging, Gray expresses shared Christian values when he explains that his change of heart comes from his faith, realizing “we’re not here to judge one another. We’re here to love one another.”

VOTERS HAVE A CHANGE OF HEART

The new messages and messengers shifted people’s perception of gay people, same-sex relationships and why gay people wanted the freedom to marry.

In November 2012, voters in Maine, Maryland and Washington voted affirmatively for the freedom to marry. Voters in Minnesota rejected a constitutional amendment that would have banned the freedom to marry. Those four votes reversed a 31-0 record of defeats at the ballot box on the freedom to marry.

The culture shift had a more significant impact. Many believe it demonstrated to at least five of the nine justices of the United States Supreme Court that public opinion had moved far enough in support of the freedom to marry to issue their landmark decision legalizing equal marriage rights on June 26, 2015.

The Atlantic’s “How Gay Marriage Became a Constitutional Right” summarizes the impact of the culture shift:

Much as Americans like to imagine judges as ahistorical applicators of a timeless code, the court is inevitably influenced by the world around it.



A TALE OF TWO ADS

Before 2012, the movement had often framed the issue in terms of rights and discrimination — like the ad the “No on Prop 8” campaign ran in California featuring Sen. Dianne Feinstein. The ads run in Maine, Washington, Minnesota and Maryland in 2012 used a framework focused on the shared values of “love, commitment and marriage,” like the ad featuring Harlan and Dottie Gardner, a grandfather and grandmother who explain why they want their granddaughter, Katie, who is a lesbian, to be able to legally marry her partner, Alex.

Sen. Dianne Feinstein



In my lifetime, I've seen discrimination. And I see it again in Proposition 8.

Eight would be a terrible mistake for CA.

It changes our constitution, eliminates fundamental rights and treats people differently under the law.

Proposition 8 is not about schools or kids.

It's about discrimination. And we must always say no to that.

No matter how you feel about marriage, vote against discrimination. And vote no on 8.

The Gardner Family



The Gardner Family – Machias, Maine

Harlan: We have four generations of our family sitting around this table. Dottie and I have been together for 59 years now. I flew in the last battle of WWII. I couldn't see how anyone who had been in combat could ever be cruel to anyone ever again. It takes a great deal of bravery to be a lesbian. I'm so proud of Katie and Alex.

Katie: We're pretty proud of you.

Harlan: Oh, good. Marriage is too precious a thing not to share.

Dottie: I would, in my lifetime, really like to be able to see Katie and Alex get married legally.

Harlan: This isn't about politics. It's about family and how we as people treat one another.



ACCELERATING CHANGE ON EMOTIONALLY COMPLEX TOPICS: THE HEARTWIRED APPROACH

To communicate effectively on emotionally complex issues, we must first know the values, mindset, emotional experience and worldview of the people with whom we are trying to communicate. Then, we can persuade them more effectively via communications that connect with their existing beliefs and feelings.

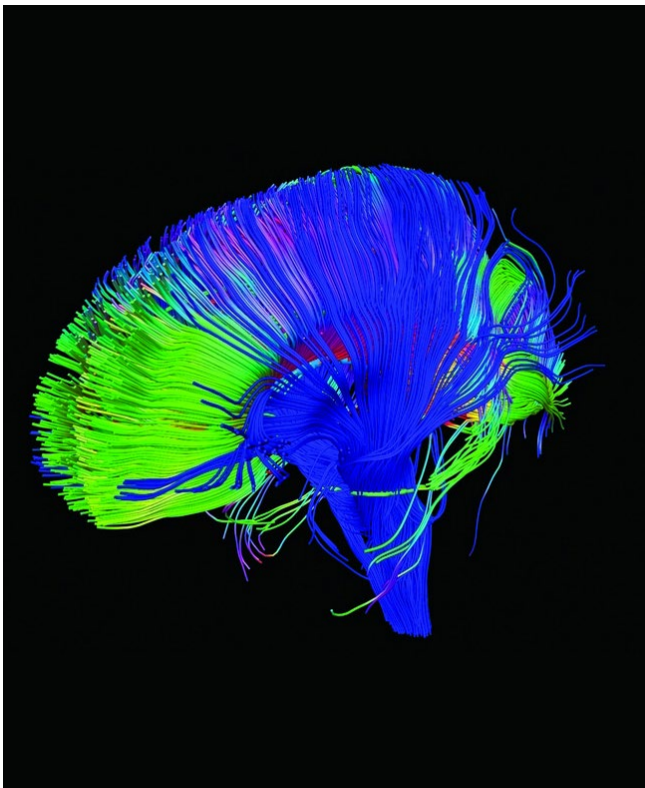


Photo Credit: NICHD via Flickr

Oftentimes, advocates do not see their issue as emotionally complex. They may see it as a straightforward process of educating the public with additional information or raising the profile of their issue. Yet, when an issue is stuck and public support has plateaued or is even shrinking, there may be emotionally complex dynamics that are interfering with people's abilities to feel or think differently on the subject matter.

The huge shift in support for the freedom to marry didn't happen overnight — and it certainly didn't happen spontaneously. It took the blood, sweat and tears of grassroots advocates and activists, legal mavens and iconoclastic funders. It also required a heartwired approach to research and messaging led by different teams of talented researchers, advocates and strategists.

Our record of developing effective research-based communications strategies is deeply rooted in a specialized approach to conducting qualitative and quantitative public opinion research on socially controversial and emotionally complex issues that we have evolved over the last 15 years. This heartwired approach, which utilizes research methodologies to unpack emotional reactions and develop effective message frameworks, is based on the latest social science and neuroaffective research.

The November 2012 election victories on marriage for same-sex couples, the 2015 passage of medical aid-in-dying legislation in California, as well as other wins you'll learn about in this guide, demonstrate the power of this approach.

Neuroaffective research — looking at how our brains process emotions, logic and primal or gut reactions — has helped us gain a clearer understanding of how these parts, individually and working together, influence how we respond to our environment and make decisions.

We know from social science research and psychology that there are underlying psychological principles and dynamics that shape people's reactions to the world around them. Individuals can see and hear the same thing, but differ widely in the ways they interpret and understand it. This new science-based research about



how human beings' brains are wired has advanced our understanding. We now know that:

EMOTION DRIVES MORAL REASONING. Human emotion interacts with reasoning, with people typically making instinctive moral judgments and then developing moral reasoning to back up their instinctive reaction.

IMPLICIT ASSOCIATIONS SHAPE REACTIONS. Human beings have an unconscious or implicit network of associations — the intertwined psychological dynamics, feelings, images, ways of understanding words — that shape their initial instinctive reaction.

HUMANS CATEGORIZE TO UNDERSTAND THEIR WORLD. Human beings are wired to categorize as we make instant judgments about what we are seeing and experiencing. Unpacking the categories people are unconsciously applying to our messages and stories is required in order to understand how to elicit other categorizations that are more favorable for us.

STORYTELLING ACCESSES PEOPLE'S EMOTIONAL BRAINS. Cognitive scientist Steven Pinker writes that “emotions are mechanisms that set the brain's highest goals. Once triggered by a propitious moment, emotion triggers a cascade of sub-goals and sub-subgoals that we call thinking and acting.” The right story transports us into the mind of the protagonist where we feel what she feels. Therefore, the right story can become just the propitious moment needed to trigger the very cascade of thoughts and actions we need from our target audiences.

MESSAGING BUILT ON SHARED VALUES IS CRITICAL TO PERSUASION. By employing messaging that already fits the deeply-held values of our audiences, we can draw on the emotional power of those values to help change attitudes within their existing belief systems, rather than requiring our audience to fully agree with all of our values in order to support the specific change we seek.

IDENTITY IMPACTS BELIEFS. Identity plays a fundamental role in allowing or preventing an individual from changing a certain set of beliefs or attitudes they hold. Messengers with whom the audience can identify increase the persuasive power of their message.

For example, in the case study you just read about winning the freedom to marry for same-sex couples, we saw that voters had a deeply flawed mental template about gay people that led them to believe that they were not like them and were disconnected from their families.

Therefore target voters believed that same-sex couples did not value marriage for the same reasons they valued marriage — like family, love and commitment. In the case study, we also showed how effective storytelling, which leveraged shared values and embedded gay people within their families and communities, helped to disrupt those flawed mental templates.

To communicate effectively on emotionally complex issues, we must first know the values, mindset, emotional experience and worldview of the people with whom we are trying to communicate. Then we can persuade them more effectively via communications that connect with their existing beliefs and feelings.

In addition, effective communications in these complex arenas are inextricably tied to the messengers delivering them. Employing messengers with whom our target audiences can identify also increases persuasion.

There are many talented social scientists whose theories deeply inform our thinking and approach, and many talented pollsters with a successful record of winning campaigns. Our approach is unique because we put these theoretical frameworks into action in both a research and real-world communications context to generate profound attitude and policy change.

When an issue is stuck and public support has plateaued or is even shrinking, there may be emotionally complex dynamics that are interfering with people's abilities to feel or think differently.



The Practice of Deep Listening: Core Dynamics to Understand



Photo Credit: Alphacolor 13 via Unsplash

Accelerating positive social change requires understanding individual and group psyches — how a person's — or even a nation's — mindset shapes their decision-making.

We need to understand what is happening inside of people as individuals, as social animals within their own social circles, and, as human beings within their broader cultural context.

For instance, when it comes to bias, an individual person might aspire to treat all individuals with equal respect. Some people in their social circles, maybe even most, may feel the same. However, culture — like entertainment and news media — may impact how they feel about and even treat those who are different from them.

In order to practice deep listening — to genuinely hear what people are experiencing — here are core dynamics to consider:

CONFLICT. It may seem counter-intuitive, but the presence of internal conflict creates opportunity. That's because without internal conflict, there is little to spur reflection and change within the individuals you seek to persuade. Our research is often focused on the investigation of conflicted feelings. We explore the ways in which people struggle between competing beliefs and values that they hold inside them and which beliefs and values prevail when they're making a particular decision, and why. Similarly, we explore the conflicts between what people say rationally and what they feel emotionally and instinctively. Without conflict, the status quo likely remains intact.

Successful persuasion strategies leverage that internal conflict to move target audiences toward support. For instance, advocates who wished to make medical aid-in-dying a legal option for terminally ill people in California, which you will read about in an upcoming chapter, would not have succeeded without the presence of conflict. Many Californians worried about the unintended consequences of such a law. Yet Californians did not want terminally ill people to needlessly suffer. Without this type of internal conflict, the reasons to be against medical aid-in-dying may have continued to prevail.

NARRATIVES. Research can also unearth for examination the stories people spontaneously tell themselves to make sense of the world around them (for example, the way they define heroes and villains — what, and who, is right and wrong). The narratives that target audiences unconsciously construct about social issues — why they are for, against or conflicted about an issue — help us to better understand the barriers to persuasion.

For instance, later in this guide you will read about research to build support for ocean protection among American millennials. Research showed that a narrative millennials constructed about the challenges facing the ocean was based on problems they could see with their own eyes — like litter on beaches. Heartwired research also helps us to understand how to construct the right story that will align with the identity, beliefs, values, lived experiences and emotions of target audiences in a way that helps to shape their future attitudes and behaviors.



LANGUAGE. During research, you have an opportunity to analyze language — the words, metaphors and categories audiences use when they talk about issues. You can examine what those words tell you about how they think about those issues, including the connections they make, the associations they have with those words or metaphors, and the ways in which the categories they place certain topics into can help shape their reactions.

As you just read earlier in this chapter, language analysis helped advocates for the freedom to marry for same-sex couples to understand how many Americans thought about gay and lesbian people as free-floating atoms because they were seen as disconnected from their families.

IMPLICIT BIAS. There are groundbreaking research approaches that can reveal how people's biases — often unconscious or implicit — shape people's attitudes and behaviors. These implicit biases can be attached

to certain types of people (e.g., women, immigrants, African Americans, LGBT people), to certain word choices, to certain messengers and so on.

In the next chapter, you'll see how funders and researchers came to understand how people's implicit biases led them to oppose programs and policies to improve the health and success of young men of color. They used research to test message and storytelling strategies to help target audiences to reduce and manage their implicit bias so they could support these programs and policies.

EMPATHY. Empathy is the capacity to genuinely understand another person's experience and perspective — the ability to walk in that person's shoes. Empathy plays a vital role in the heartwired approach to research and communications. Accelerating change on social issues often requires that our messaging elevates a feeling of empathy among our target audiences.

Empathy: Understanding does not equal agreement

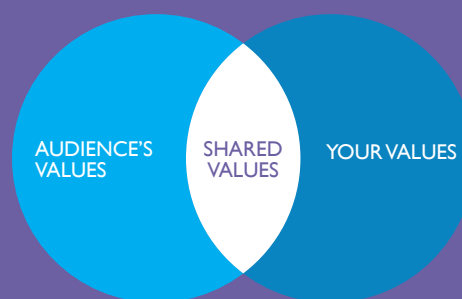
We're often asked, "But what if the values of our target audiences suck?" Advocates often disagree with the deeply held values and beliefs of target audiences, and may dismiss or try to counter their opinions.

Being asked to understand an opposing point of view can feel like you are validating it.

Disagree or not, that person's belief remains true for them. To effectively engage audiences, we have to understand and integrate those beliefs into our communications — or those beliefs remain roadblocks to change.

Empathy doesn't require that you agree with a perspective — only that you can genuinely understand it.

In audience research, you're listening for the Venn diagram — the places where your audience's values overlap with yours.



Consider reproductive rights advocates working to defeat the draconian measure that would have outlawed abortion services and even some birth control. Advocates' values may have felt far different than those of self-described pro-life voters. Yet they were able to find common ground — *that this measure simply went too far*.

Practicing empathy allowed advocates to make a crucial messaging decision that enabled defeat of a dangerous ballot measure.

This listening process also helps root out troubling beliefs — like racist or sexist views — which you would not use to advance your goals.



CHAPTER 2

THIS IS YOUR BRAIN ON RACE



In this chapter, you'll learn about how public health advocates used research to understand how to navigate the dynamics of race that might foster opposition to efforts to promote the health and success of young men of color. You'll also develop an understanding of how the brain processes emotionally complex, controversial issues.

INVESTING IN THE HEALTH AND SUCCESS OF YOUNG MEN OF COLOR: A HEARTWIRED CASE STUDY

“The moment I found out I was having a son was a mix of joy — and a weird sadness at the same time,” Maisha Simmons said thinking about her son who was just shy of his second birthday.

“I wanted a boy, but I know his journey is going to be shaped by so many factors that are outside of our family’s love for him — like the neighborhood where we live or the school we send him to,” she said.

Simmons added, “Being a Black boy, he’s going to have to navigate a lot of racial micro-aggressions.”

Simmons is a senior program officer at the Robert Wood Johnson Foundation (RWJF) where she coordinates Forward Promise, the Foundation’s initiative to improve the health and success of middle school- and high school-aged boys and young men of color.

For Simmons and her colleagues at Forward Promise, the challenge was about building public support for effective programs that foster the health and success of young men of color — while navigating the dynamics of race and ethnicity in America.

BUILDING A CULTURE OF HEALTH

Simmons and her colleagues launched Forward Promise more than five years ago because a compelling body of evidence shows that boys and young men of color are more likely than their white peers to grow



EMS Corps is helping local health care providers grow and diversify their workforce by training young men from the community to be emergency medical professionals.

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up in poverty, to witness and experience violence in their neighborhoods, or to go to schools without the resources to provide them with a quality education.

“As part of this work, the big question we are always asking ourselves is what would it look like for every young man of color to grow up in a culture of health,” Simmons said. “We know, for example, that there would need to be positive school environments, access to role models, job training, support to understand and heal from trauma in their lives, and pathways to college and career, to start.”



“It’s clear that young men of color face daunting barriers to health that directly impact their potential to succeed and thrive,” said Simmons, adding, “Access to a series of supports and conditions specifically designed to address these barriers can dramatically change their life trajectory.”

As a mother, the work is more personal than ever for Simmons. “We need to build a culture that recognizes and acknowledges that all young men have the potential to struggle and then to succeed,” said Simmons.

Simmons can point to a range of effective programs that foster the health and success of young men of color.

For example, East Baltimore Development, Inc., established by community, government and philanthropic stakeholders to revitalize East Baltimore, works to reduce depression and anger among elementary-aged boys. By addressing the trauma and violence they have experienced in their neighborhoods,

the program is also fostering important coping skills in these boys.

In Clayton County, Georgia, the juvenile court is working in partnership with schools to reduce suspensions and school arrests and to increase graduation rates. Judge Steven Teske of the juvenile court brought together educators, parents, students, law enforcement officers, mental health experts and social service workers to develop a new protocol to handle misdemeanors. The new system includes workshops, mediation and a system of care to help respond to and resolve social factors that lead kids to act out.

Across the country on the east side of the San Francisco Bay, Emergency Medical Services (EMS) Corps provides job training as emergency medical technicians to young men of color, including those involved in the juvenile justice system. Young men are paid to participate in a five-month program that includes tutoring, career workshops, physical fitness and mentor support.

THE UNIQUE POSITION OF BOYS AND YOUNG MEN OF COLOR

The Robert Wood Johnson Foundation is not alone in its focus on improving the health and success of young men of color. The work of Forward Promise is part of national efforts among foundations, nonprofits, government agencies, community organizations and elected officials to address the factors that shape the lives of young men of color.

Here’s how Forward Promise describes the importance and need for this type of targeted work:

Together we can realize a future where young men of color have the opportunity to become healthy adults who contribute to their communities and society.

The path to adulthood can be especially difficult for many middle- and high-school- aged young men of color. They are more likely to grow up in poverty, live in unsafe neighborhoods and go to under-resourced schools — all of which has a lifetime of impact on their health and well-being.

What is at stake for America is the possibility of losing an entire generation of productive men who will fall short of their potential, live less healthy lives and fail to build and strengthen their communities.

All young people require support on the road to becoming healthy and productive adults, and a young man’s path to growing up is likely to involve experimentation and risk-taking as they shape their masculinity and exert independence.

The data shows that for young men of color those actions, which for other young men would be treated as youthful mistakes, are judged far more severely and often result in lasting punishment. Helping young men navigate their teenage years successfully is key to helping them reach their full potential.

Reaching young men without targeted programs or initiatives can prove difficult. Girls and young women benefit when boys and young men are put on a path of health and success and become thriving members of their communities.

Forward Promise does not subscribe to the traditional model of focusing on risk factors, rather, we are focused on opportunity factors—factors and influences that play a critical role in helping young men grow up healthy, get a good education and find meaningful employment.



EMS Corps had a huge impact on the life of Dexter Harris.

“I just thought I could just run around in the streets and make a living off that,” Harris told *PBS NewsHour* in 2014. “If you grew up like me, my house — home was kind of rocky. You didn’t have somebody telling you, ‘Oh, you can be whatever you want to be. You could be a doctor. You could be a lawyer.’ So you kind of start just looking up to the wrong people.”

“When he was 17, Dexter spent most of his time trying to earn money. He wasn’t thinking about his future,” said Simmons. “He was thinking about surviving the here and now. Instead of finishing his senior year, Dexter found himself in a California juvenile facility. There, he met a mentor named Mike who told Dexter about EMS Corps.”

“After hearing about EMS Corps, something changed for Dexter,” Simmons continued. “Dexter threw himself into studying, and eventually graduated first in his EMS Corps class. As a certified EMT, Dexter now has a career with Paramedics Plus and returns to the juvenile facility to teach other young people about being a first responder.”

The Forward Promise strategy was focused on taking promising programs to scale. To do so, they would need to shift the troubling narratives about boys and young men of color that undermine public support for investing in their health and success.

“The wide variety of promising programs will only take us so far unless we continue to shift *larger* narratives about young men of color in our culture,” Simmons added.

To better understand how to grow public support to address disparities in health and opportunity that affect young men of color, Simmons and RWJF worked with a research and strategy team that included Fenton, Goodwin Simon Strategic Research, Wonder: Strategies for Good and Westen Strategies.

The research team working with RWJF wanted to understand the attitudes and values that influence how audiences think about these issues, and to develop messaging that builds public support among Americans for the types of targeted interventions that have been proven to help young men of color.

RESEARCH: MEASURING THE TECTONIC SHIFTS OF RACISM

Research and accurate measurements of attitudes on race are challenging because bias and racism often operate at a subterranean, or unconscious, level. Just as hard-to-measure shifts in tectonic plates can have subtle or massive impacts on the earth’s surface, the sometimes unseen forces of racism can also have both subtle and massive impacts on human reactions in any given moment or environment.

Social desirability bias — a research respondent answering questions in a way they hope will be viewed favorably by others — is especially present when the topic is race. Most people do not want to be viewed as prejudiced by other people. As such, they may be reluctant to express their honest opinions on topics related to race. Instead, they may offer other reasons for their point of view, which can mislead researchers not attuned to these dynamics.



Photo Credit: Neil Conway via Flickr

Implicit bias was another research barrier. Implicit bias — unconscious beliefs or judgments toward other people based on factors like their race or gender — influences support for an issue or program, but can be difficult to measure using traditional research methods.

Dr. Drew Westen, a member of the research team, has pioneered research approaches to measure implicit bias.





In “How Our Unconscious Votes,” a 2008 *Newsweek* article, Westen shared that “Only 3 or 4 percent of people today consciously endorse racist sentiments... but there are residues of prejudice at the unconscious level...” He added, “Our better angels on race tend to be our conscious rather than our unconscious values and emotions.”

Understanding how dynamics like social desirability bias and implicit bias impact the validity of opinion research, the research team developed a research methodology that could transcend these barriers to understanding attitudes and effective messaging approaches when race is a factor. For instance, the RWJF research included race-specific **focus groups** among Black, Latino and white audiences in Denver, Philadelphia and Raleigh, N.C. The race-specific groups, which were moderated by racially-matched moderators, lowered the likelihood that research participants would censor themselves, which is more likely in mixed-race settings when the topic has to do with race.

After analyzing the focus groups, the research team conducted an in-depth online survey with a representative sample of 1,209 U.S. adults to ensure that the tested approaches would succeed in all corners of the country. The survey tested a wide range of messaging and storytelling strategies to communicate about targeted programs that support young men of color and the impact of these programs.

Online surveys are an especially powerful tool at gathering both qualitative and quantitative findings in a way that minimizes social desirability bias. The online format allowed participants to explain and contextualize their responses, providing a wealth of qualitative content for further analysis. Since research participants can complete the survey in the privacy of their own home without having to interact with a telephone pollster, they are also more likely to share their honest opinions.

The research team purposefully tested both supportive messages as well as opposition messages (reasons to oppose programs that support the health and success of young men of color). Testing both supportive and opposition messages would help to ensure that the messaging approach could succeed in a real-world context — where people hear reasons both for and against an issue.

Finally, the team wanted to test people’s conscious and unconscious responses to messages, including both opposition and supportive messages.

Using technologies developed over decades by psychologists and neuroscientists and harnessed for large-scale web-based research by Implicit Strategies, the research team conducted an online survey that accounts for implicit bias in its measurements. According to implicitstrategies.com, this research technology measures “gut-level emotional responses” to messages.

MAPPING MINDSETS ON RACE

Before the team could develop heartwired message strategies, they first needed to understand people’s existing mindsets related to race. We outlined these mindset insights in *Removing Barriers and Creating Opportunities*, a messaging guide we developed in partnership with our collaborators and the Robert Wood Johnson Foundation.

Barriers to Understanding

Research projects that are focused on changing attitudes on emotionally complex social issues first require that we unpack the barriers to understanding. When the topic is race, there are many of those barriers. In *Removing Barriers and Creating Opportunities*, the research team wrote:

The public’s existing beliefs and attitudes impact their ability to empathize with young men of color and acknowledge the challenges they face. Of particular importance is the fact that most Americans prefer to avoid conversations about diversity and race altogether.

For one, many white Americans tend to view racial discrimination as a thing of the past. This world view makes it hard to readily accept the idea that young men of color continue to experience significant barriers to health because of their race or ethnicity. Often, white Americans look for other reasons that disparities exist, such as the breakdown of an individual’s family.

Research has found this may be tied to the fact that a majority of white Americans still move through the world with limited knowledge and interaction with people of color. According to a 2013 survey from the Public Religion Research Institute, white social networks are 91 percent white, compared to Black networks, which are 65 percent homogenous, or Hispanic networks, which are 46 percent homogenous (Jones et al. 2013). This means that most white Americans are less likely to hear about racial discrimination or inequity from someone they know.

White Americans are also more likely to believe that anti-white bias is a bigger societal problem than anti-



Black bias. Researchers at Tufts University discovered that whites view racial preference as a zero-sum game. They believe that efforts to reduce discrimination against Blacks has directly led to more discrimination against whites – a trend not reflected in Blacks’ own perceptions (Norton and Sommers 2011). As a result, whites often assume that giving more help to young men of color means giving less help to everyone else.

Empathy Walls



In her book, *Strangers in Their Own Land*, sociologist Arlie Russell Hochschild writes, “An empathy wall is an obstacle to deep understanding of another person, one that can make us feel indifferent or even hostile to those who hold different beliefs or whose childhood is rooted in different circumstances.” We encountered empathy walls in this research, which manifested in numerous ways as described in *Removing Barriers and Creating Opportunities*:

Through our research, we found Americans generally see young men of color as “others” or a “them,” rather than as part of a greater “we.” This attitude suggests that overall our society lacks empathy for young men of color. Empathy means genuinely understanding another person’s perspective or point of view, even if you disagree with it. It is the feeling of putting yourself in another person’s shoes.

From social psychology research, we know that shared identity helps to facilitate empathy, and that race or ethnicity is one important shared identity. When that shared identity is absent, though, people make decisions with more judgment than empathy.

Because biased messages about people of color permeate our media, culture, schools, and courts, we are all susceptible to implicit bias, and research has demonstrated this includes people of color themselves (Nosek et al. 2002; Rutland et al. 2005).

As shown by researchers at the University of Colorado Boulder, participants in four studies consistently shot armed and unarmed Black targets in a video game more rapidly and more frequently than white targets. Researchers documented the same levels of bias whether the participants were Black or white (Correll et al. 2002).

A Difficult Conversation

While talking about race is an important and necessary conversation that could lead to greater empathy and

understanding, it doesn’t mean that it’s a conversation that many Americans want to have. As shared in *Removing Barriers and Creating Opportunities*:

Most Americans believe our nation has made great strides in eliminating racism, but it is still difficult for them to talk about race and prejudice – especially the structural nature of racism. Many even think that our nation no longer needs to engage in discussions about race and racism. A recent YouGov study (Moore 2015) learned that most white Americans, and roughly half of Latino Americans, believe our nation talks too much about race, while Black Americans feel the exact opposite.

According to Derald Wing Sue, author of Race Talk and the Conspiracy of Silence, these aversions to discussion of race may have to do with societal norms and personal comfort level. “To preserve harmonious, interpersonal relationships, there are certain topics that are taboo and we have to tiptoe around them in order not to offend others,” Sue explains in an interview (Trent 2015). In addition, he adds, people don’t want to acknowledge color, “because if you do, it may indicate that you are racist and biased.”

The Robert Wood Johnson Foundation developed *Removing Barriers and Creating Opportunity*, a research-based messaging guide focused on expanding the conversation around young men of color. The guide includes five strategic recommendations to grow support for programs supporting the health and success of young men of color:

- # 1: Talk About What All Kids Need
- # 2: Show, Don’t Tell
- # 3: Tell Solution Stories
- # 4: Use Values-Based Words and Messages
- # 5: Deploy Trusted Messengers

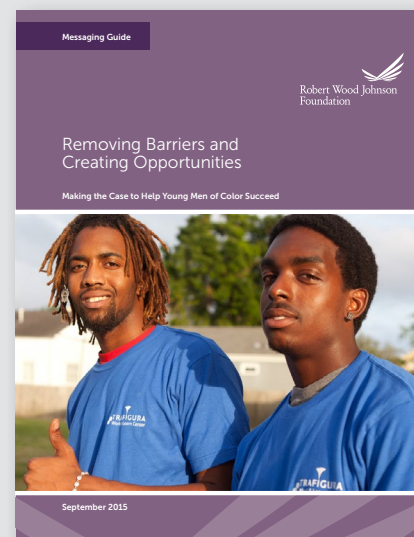


Photo: © 2015 Tyrone Turner. Used with permission from the Robert Wood Johnson Foundation



APPEALING TO THE BETTER ANGELS OF OUR NATURE

In the end, one message struck an emotional chord and tested best among all audiences — regardless of race or gender. It worked because it nurtured empathy for boys and young men of color by appealing to target audiences' parental mindset. Regardless of whether they are parents, many adults want to see themselves as people who care about the well-being of young people.

Any parent can tell you that the teenage years are hard. That's especially true for teenage boys. They are more likely than girls to engage in risky behavior like smoking or drinking. Young men of color have it even harder. They are more likely to grow up in poverty, with challenging family situations, or in violence-ridden neighborhoods. When young people do not have the basics — like food, or a safe place to live, or a loving family — they are more likely to fall behind and act out in class, or even drop out of school altogether. We need to teach young men that a better future is possible by giving them mentors, like teachers and coaches, who have overcome similar challenges in their own lives and counselors who help them make healthy choices. If we teach our young men the skills to be resilient and responsible adults, they will have a much better chance of succeeding in life.

As you'll note, the message began by talking about *what all teenagers need*, especially teenage boys. By starting here, you are priming the parental mindset that allowed us to safely introduce facts about the barriers that made teenage life even more difficult for many young men of color.

For many men in the focus group rooms, this message reminded them of the youthful mistakes they had made. For parents of either gender who are raising sons, many heads nodded at the idea that boys and young men engage in riskier behavior than girls.

It was imperative that the messages established how young men of color are *like* all young people before effectively being able to introduce how their lives and social circumstances are *different*.

The research also showed that many Americans often see targeted programs that meet the needs of a specific gender or racial population as a zero-sum game.

In other words, many Americans believe that if a program exists to meet the needs of young men of color because of the specific challenges they face, then there will be

fewer resources available to other young people — young women or white young men.

Stories were the antidote to the zero-sum effect. Not just any stories — audiences were moved by stories that showed the specific challenges faced by a young man of color and the ways in which his life was transformed by a program.

SHINING THE SPOTLIGHT ON SUCCESSES

Today, programs like EMS Corps are gaining attention and support because they are able to demonstrate how their programs are changing the lives of real young men.

Jimmy Jordan, an EMS Corps graduate explained the power of the program to *The New York Times*, saying, "The corps has made me proud of myself. Being with patients is a maturing, humbling kind of experience. I'm not going to be another homeless teenager not knowing what to do with myself."

To expand the reach of promising programs like EMS Corps, RWJF made a \$12 million investment in March 2017 to launch a national program office for Forward Promise at the University of Pennsylvania Graduate School of Education (GSE). Led by Dr. Howard Stevenson, Director of the Racial Empowerment Collaborative of Penn GSE, the office will focus on efforts to limit the effects of trauma and foster healing among middle- and high school-aged boys and young men of color.

"We know that boys and young men of color all over this country have many gifts that our society needs," said Stevenson, a clinical and consulting psychologist who studies how young people can develop healthy racial and ethnic identities. "It's in everyone's interests to facilitate their healthy development so that we might all benefit from the dreams and talents they have within them."

Reflecting on her young son, Maisha Simmons of Forward Promise said, "Too often, young men of color in our society are presented in ways that lead people to see them as unworthy of love, support and investment. This research tells us that a different narrative about young men of color — one that underscores a common humanity — can significantly move and change hearts and minds."

"The vast majority of Americans want all young people to have the tools to make healthy choices and the opportunity to live a healthier life," Simmons added. "When we start the conversation there, we remind our audiences that young men of color deserve the same chance to thrive that every young person should have."



WHAT WORKED: SAMPLE STORIES

During the various stages of research, we tested micro-stories — short character-based descriptions of programs that Forward Promise was working to build support for. This type of concrete messaging showed us the power of *show, don't tell*. While testing real programs, we changed the names of program participants to respect and protect their privacy. The programs resonated strongly among all target audiences. Here are examples of the types of program stories that tested well:



Photo Credit: iStock

Rites of Passage

Being a teenager is hard — especially if you don't have family support or enough good role models. Having adult mentors who can guide you helps. Through Rites of Passage, young men develop their own mission statements and get mentoring to overcome the challenges of young adulthood. Nine out of 10 program graduates are working full time or are enrolled in college.

“We want every young man to strive to reach his personal potential and let them know they don't have to do it alone.”

—CEDRIC WASHINGTON, RITES OF PASSAGE MENTOR

Safe Schools For All

The best place for young people is in a classroom where they can learn and stay out of trouble.

Unfortunately, too many schools have “zero tolerance” policies that kick kids out for making a mistake or acting out.

Safe Schools for All offers a better way: Train teachers and administrators to hold students accountable, to make amends while keeping them in school where they belong. Schools that have adopted this program have seen a major drop in suspensions and an increase in graduation rates.

“I used to think the only way to deal with a student who was acting up was to kick him out. With the Safe Schools approach, we still hold students to a high standard, but we keep them in school where they have a chance to learn and grow from their mistakes.”

—MARCUS HUMPHREY, MIDDLE-SCHOOL TEACHER



Photo Credit: iStock

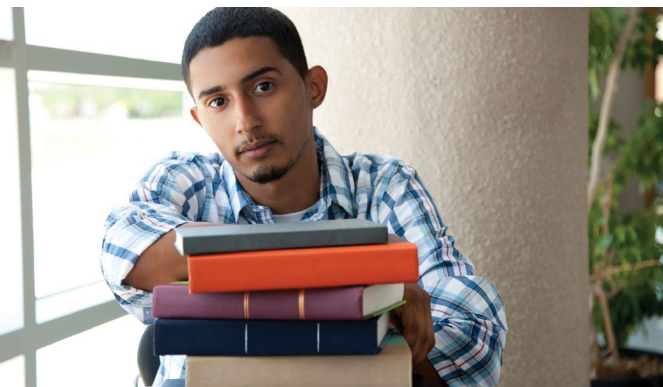


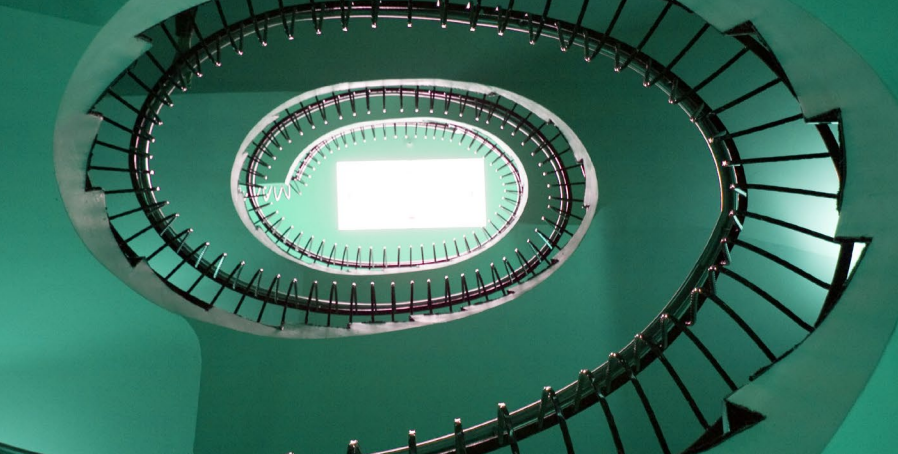
Photo Credit: iStock

Brother to Brother

“My dad left my mom and me when I was 6. By 7th grade I was skipping class. I was always getting in trouble for being late and talking back. After talking to my mom, my principal helped me enroll in a therapy group for young men like me. We talked about everything. We did our homework together. We became like brothers. They gave me the support I needed to get on the right track.”

After three years as a participant and mentor in Brother to Brother, Miguel graduated high school last spring. He is now enrolled in community college and is working toward a teaching degree.





Understanding the way that people's downstairs brains are triggered by fears and concerns allows us to develop messaging that helps audiences to manage and calm their anxiety, discomfort and other negative emotions.

Photo Credit: ReflectedSerendipity via Flickr

CONCEPT CATALYST: **UPSTAIRS BRAIN, DOWNSTAIRS BRAIN**

This example of communications related to racial equity illustrates that before you can develop successful persuasion strategies on emotionally complex issues (race, climate change, education reform, abortion), you must first navigate the upstairs and downstairs corridors of the human mind. That's because the brain impacts how and what we are capable of hearing, feeling and processing.



In their book, *The Whole-Brain Child*, which is focused on nurturing children's developing minds, Daniel J. Siegel, M.D. and Tina Payne Bryson, Ph.D. share among the best and most accessible descriptions of the complex human brain.

Imagine your brain is a house, with both a downstairs and an upstairs. The downstairs brain includes the brain stem and the limbic region, which are located in the lower parts of the brain, from the top of your neck to about the bridge of your nose. Scientists talk about these lower areas being more primitive because they are responsible for basic functions (like breathing and blinking), for innate reactions and impulses (like fight or flight), and for strong emotions (like anger and fear).

Your upstairs brain is completely different. It's made up of the cerebral cortex and its various parts — particularly the ones directly behind your forehead, including what's called the middle prefrontal cortex. Unlike your more basic downstairs brain, the upstairs brain is more evolved and can give you a fuller perspective on your world. You might imagine it as a light-filled second-story study or library full of windows and skylights that allow you to see things more clearly.

To apply the Siegel/Bryson description in the context of tough social issues, when our downstairs brain is calm, our upstairs brain has the capacity to pause, be reflective and aspire to be our better selves, which is a powerful motivator for good. But when the downstairs brain is triggered, it produces emotional noise that makes it difficult for the upstairs brain to listen to and hear thoughtful reasons to be supportive of an issue.

In that state, you are literally not able to access certain parts of your thinking brain and your positive emotional self — the fight or flight mechanism shuts them down.

Think back to the case study on young men of color where we saw that many in our target audience were unconsciously triggered by their **implicit bias** as well as their sense that programs that benefit one group mean that something is being taken away from another group — particularly people like them.

Understanding the way that people's downstairs brains are triggered by these fears and concerns allows us to develop messaging that helps audiences to manage and calm their anxiety, discomfort and other negative emotions.

This approach enables their upstairs brain to effectively hear and respond to the messages being communicated, which is key to developing your persuasion strategy. It means that when developing communications, we need to think deeply about the emotional and psychological tools that we need to equip our audience with so they can get back to their reflective self.



CHAPTER 3

ONE AUDIENCE LEADS TO THE NEXT



See how advocates for three different causes — medical aid-in-dying, raising the minimum wage and enacting soda taxes — mapped out their change strategies. We'll also introduce you to “diffusion of innovations” — a theory of why, how and at what speed new ideas spread through a population — and apply that theory to show how building support among one audience segment can hasten progress toward a tipping point of change.

GIVING PEACE OF MIND TO TERMINALLY ILL PEOPLE AND THEIR FAMILIES: A HEARTWIRED CASE STUDY

Toni Broaddus was hired with a mission: Make it legal for terminally ill Californians to request life-ending medications from physicians to end their pain and suffering.

In 2013, Compassion & Choices, a national advocacy organization focused on improving care and expanding options at the end of life, hired Broaddus to lead their California advocacy efforts. California was a cornerstone in a state-by-state strategy to expand medical aid-in-dying as a legal option for people with only weeks or months to live.

Advocates in Oregon had succeeded in both passing a law at the ballot box in 1994 and then defending it against an attempt to repeal it in 1997. The next successful ballot measure came more than 10 years later, in 2008, when voters in Washington State voted to make medical aid-in-dying a legal option for terminally ill people. In 2013, Vermont advocates succeeded in the state legislature. When Governor Peter Shumlin signed the bill, Vermont became the third state in the nation to pass a medical aid-in-dying law.

Oregon, Washington and Vermont all have something in common: a relative lack of religiosity among voters.

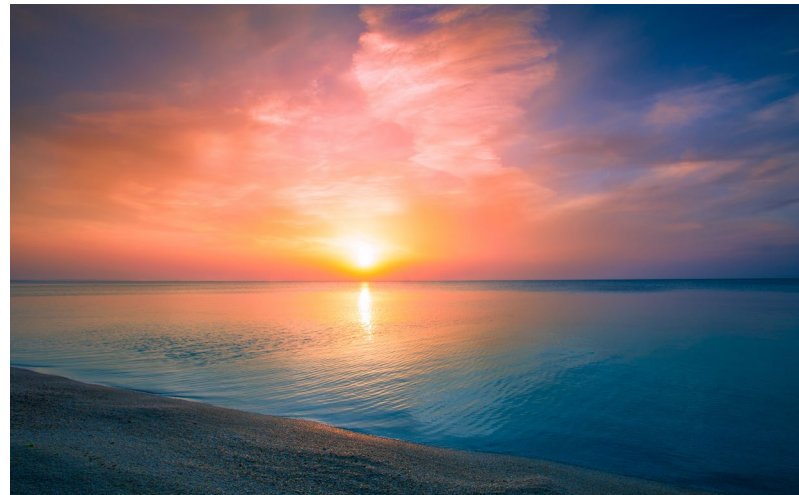


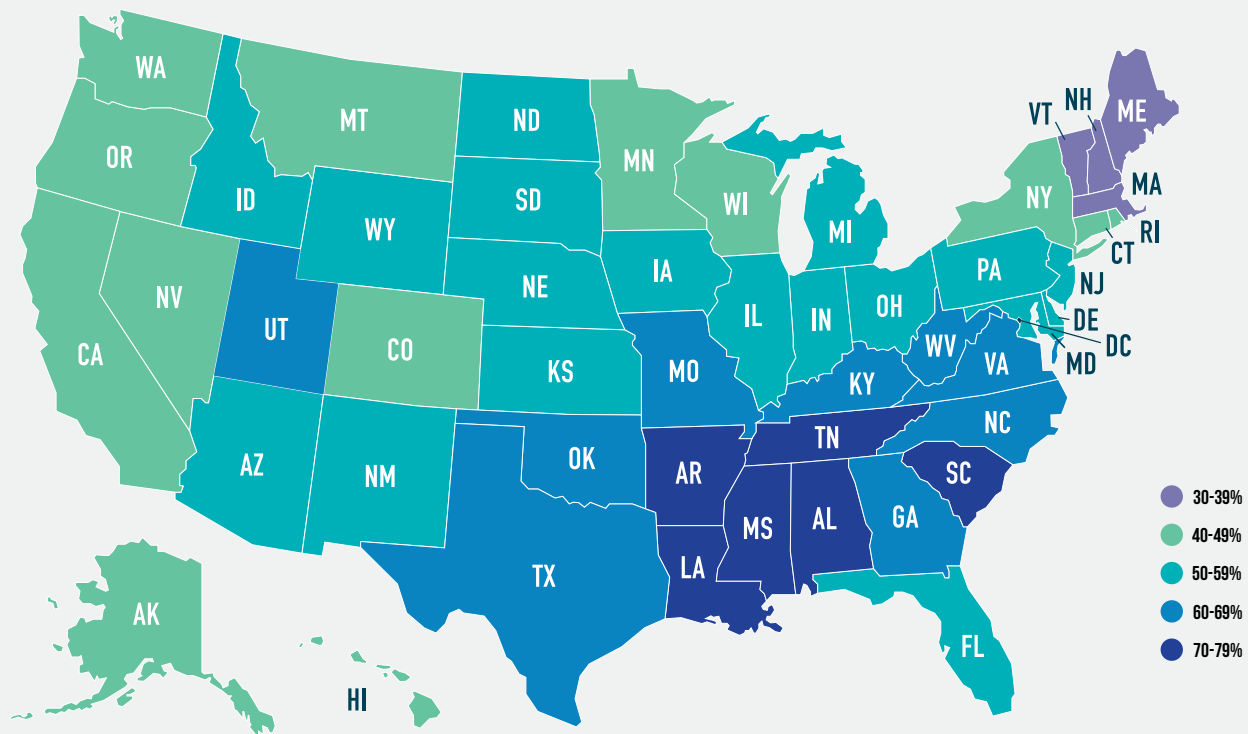
Photo Credit: iStock

According to the Pew Research Center's 2016 Religious Landscape Study, Oregon, Washington and Vermont ranked 39th, 44th and 48th, respectively, in a list of state religiosity. While all of these states have deeply religious voters, they also have among the lowest proportions in the country. For advocates of medical aid-in-dying, voters and legislators in Oregon, Washington and Vermont fit the profile for early adopters for this type of policy.



OVERALL RELIGIOSITY BY STATE

% of adults who are “highly religious”



Credit: “Religious Landscape Study” Pew Research Center, Washington, DC (September, 2014) www.pewforum.org/religious-landscape-study/.

“While it still required the right messaging and smart research, most of these voters did not have a religious objection to the idea of giving this option to terminally ill people,” said Paul Goodwin, a veteran public opinion researcher who worked on all of the successful ballot efforts in Oregon and Washington.

“Both of these states also have a type of frontier mindset — made up of folks who moved here from somewhere else or whose ancestors did,” Goodwin added. “A large number of voters in these states are simply unafraid to be the first to adopt a never-before-enacted public policy. It made sense to start in states like Oregon and Washington because voters there had the right characteristics to be early adopters on a policy like aid-in-dying.”

The strategy for expanding access certainly wasn’t as straightforward as choosing to roll it out into reliably blue or relatively unchurched states. In 2012, voters in Massachusetts narrowly rejected a medical aid-in-dying ballot measure by 52 percent to 48 percent. Appeals to Catholic voters seemed to undermine support for the measure, including public opposition from Victoria

Kennedy, the widow of Senator Ted Kennedy, who died from brain cancer.

In California, advocates had been trying for more than 20 years to make medical aid-in-dying a legal option for terminally ill people, but voters and legislators had both previously rejected these efforts.

In 1992, California voters defeated Proposition 161 by 54 to 46 percent, rejecting a measure that would have allowed physicians to prescribe or administer life-ending medication to a terminally ill person.

In 2005, two California legislators introduced Assembly Bill 651, the California Compassionate Choices Act. With opposition from the California Medical Association, U.S. Conference of Catholic Bishops and disability rights advocates, the bill was never able to garner enough votes to get out of the State Assembly.

These previous unsuccessful efforts made it clear that the issue does not fall along neat partisan lines in otherwise “blue” California.



While California is certainly not the least religious state, it is by no means the most religious state either. That same Pew survey ranked California as the 35th most religious state, with many legislators, as well as their constituents, who are religious.

However, the racial and ethnic make-up of California's voters and legislators is far more diverse than in Oregon, Washington or Vermont. With research showing that many people of color have a **lived experience** of negative impacts from implicit bias among health care professionals — along with a history of explicit racism, like the Tuskegee experiments performed on African Americans — persuading legislators would be more challenging in California.



Photo Credit: National Institutes of Health

In 2014, Broaddus was no stranger to emotionally charged social issues. She spent several decades working to advance policies to protect lesbian, gay, bisexual and transgender people, including marriage for same-sex couples and non-discrimination protections.

Broaddus was now charged with making California a cornerstone of a state-by-state strategy to advance medical aid-in-dying.

"If a state-by-state strategy was to work, California was the next logical step to expand medical aid-in-dying as an option for terminally ill people," said Broaddus. "Advocates had never succeeded in a state as racially and ethnically diverse as California. Our messaging needed to ease the moral concerns of Christian legislators and our Catholic governor. To succeed, we first needed to understand how to talk to people of faith and people of color."

Broaddus brought on a research and message strategy team that included Goodwin Simon Strategic Research, Wild Swan Resources and Wonder: Strategies for Good.

From the start, the team employed the applied psychological approach to explore how the audiences' identities, values and lived experiences aligned and collided with this issue. The research team led a **media audit** to determine how the issue had been framed in the press in California and other states. The team also conducted **social listening research** to understand how ordinary Californians talked about the issue.

The early landscape research in California unearthed a deep conflict — that while a majority of Californians did not want to see terminally ill people suffer needlessly, they nonetheless had concerns about the unintended consequences of passing a law to allow medical aid-in-dying.

People's lived experiences contributed to their concerns about unintended consequences — including their experiences with doctors who had somehow "gotten it wrong" when it came to a terminal diagnosis as well as watching their own loved ones die. Their **beliefs** that doctors might pressure terminally ill people to choose this option to save money, or that greedy family members would push vulnerable people to exercise the option, also generated concerns.

After mapping the rhetorical landscape, the research and strategy team created and tested message and story strategies in focus groups among African-American, Asian and Pacific Islander, Latino and white voters in California.

Early **focus groups** showed that some Christian voters raised moral objections, especially when they interpreted the initial messaging to suggest that they *should* choose this option if they were diagnosed with a terminal illness.

Revised messaging and carefully structured, heartfelt stories, delivered by messengers whom they related to through a shared sense of **identity** as a Christian, for instance, helped to calm their concerns.

These heartfelt stories, when combined with messages that emphasized shared **values** — such as honoring and respecting the decision of a terminally ill person and their family even if we might make a different decision when facing similar circumstances — helped voters to manage their own qualms and concerns with the policy.



The research team also developed a statewide [online survey](#) that tested the impact of different word choices on the topic among California voters. Based on that research, the research and strategy team created a message and storytelling guide that Compassion & Choices put to work in their public communications and legislative advocacy.

Complementing their grassroots advocacy work, the research and strategy team worked with Compassion & Choices on how to most effectively share the stories of California families struggling with the terminal illness of a loved one and how the law would give those families peace of mind even if they didn't use the option. Compassion & Choices tapped their network to find families willing to share their stories.

During this time, the story of Brittany Maynard struck an emotionally powerful chord with the nation. Maynard, who lived in California, had an aggressive form of brain cancer. Without a legal option to take life-ending medications, she worried about the prolonged suffering and pain that she would have to endure. Together with her husband, Dan Diaz, she moved to Oregon where medical aid-in-dying was a legal option.

Maynard's story, and countless others like it, helped to generate empathy among reluctant audiences — even those who would never consider the option for themselves if they were terminally ill. The stories featured diverse messengers including Catholics, Latinos and Republicans.

In an op-ed in the *Sacramento Bee*, civil rights icon Dolores Huerta recounted the prolonged, agonizing death of her mother from breast cancer. In her appeal to legislators, she wrote:

For those caring legislators who could never imagine considering this option for themselves if they were terminally ill — because it may conflict with their values and beliefs — this vote must be especially tough.

My lifelong work as an advocate for social justice has taught me that these difficult moments require our utmost compassion, the wisdom to imagine walking in another person's shoes and the ability to respect the wishes of others. Those of us who have cared for a loved one and witnessed a lengthy and painful dying process are urging legislators to act now.

Change Created: After More Than 20 Years, Advocates Succeeded in Making Medical Aid-In-Dying a Legal Option for Terminally Ill Californians and Their Families

The messaging strategy also emphasized the many safeguards included in the legislation to assure concerned Californians that the law would work as intended, since some voters were particularly worried about unintended consequences from a new law. Voters appreciated knowing that nearby states like Oregon and Washington had had a similar law in place for years already and those feared unintended consequences had not come to pass there.

After more than 20 years, advocates succeeded in making medical aid-in-dying a legal option for terminally ill Californians and their families.

On October 5, 2015, Governor Brown signed legislation making California the largest state in the nation to allow the option for medical aid-in-dying — more than 20 years after voters had rejected a similar proposal at the ballot box.

Gov. Brown's signing letter approving the legislation powerfully reflected the messaging framework developed by the research and strategy team. He wrote:

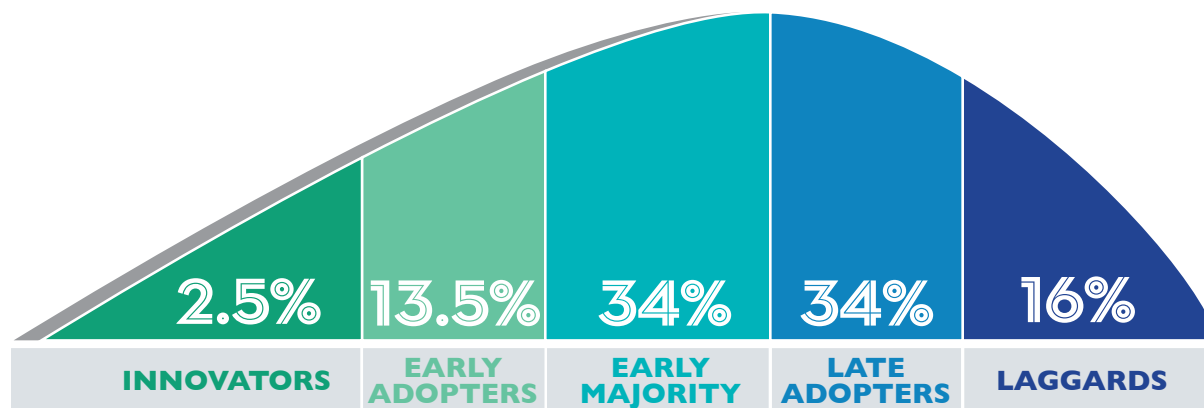
In the end, I was left to reflect on what I would want in the face of my own death. I do not know what I would do if I were dying in prolonged and excruciating pain. I am certain, however, that it would be a comfort to be able to consider the options afforded by this bill. And I wouldn't deny that right to others.

In 2016, the California law went into effect. The regional strategy is also paying off for Compassion & Choices. That same year, Broaddus and her colleagues succeeded in getting a medical aid-in-dying measure passed by voters in Colorado and in Washington, D.C.



DIFFUSION OF INNOVATIONS THEORY

One audience leads to the next.



CONCEPT CATALYST:

DIFFUSION OF INNOVATIONS THEORY

The state-by-state strategy to expand medical aid-in-dying as a legal option for terminally ill people is a powerful example of **diffusion of innovations** theory. When thinking about how to create change, our research approach is informed, in part, by a theory first developed by Everett M. Rogers, which explains how ideas gain momentum and spread over time through a specific population or social system.

This theory suggests that the adoption of new ideas or attitudes does not happen simultaneously in a social system. Instead, ideas spread along a continuum with one audience segment influencing the next, beginning first with “innovators” and “early adopters” who help to spread the new idea and build support among the “early majority.” For advocates of medical aid-in-dying, their success was built by going into potential early adopter states like Oregon, Washington and Vermont before moving to an early majority state like California. For every issue, these audience segments will be comprised of different types of people depending on your ultimate change goal. By focusing on the right audiences, you can hasten a tipping point toward broader support.

A number of social science researchers have found that people who adopt a new idea earlier than others have different characteristics than people who are late adopters. In your efforts to reframe discussions and attitudes around your issue, it will be important to understand the characteristics and attitudes of innovators and early adopters (who comprise your base) as well as the early majority. This will allow you to develop an audience segmentation strategy that leads to a tipping point of change on your issue.

Advocates for other causes have also had success putting diffusion of innovations theory into practice.

THE FIGHT FOR \$15: DIFFUSION OF INNOVATIONS THEORY AT WORK

In 2012, the federal minimum wage was stuck at \$7.25 an hour. It had last been increased by 70 cents in 2009 and had seen only two other modest increases since 1997, when it was \$5.15 an hour. As the economy recovered slowly from the 2008 recession, minimum-wage workers were left even further behind.



Advocates determined that bold vision and actions were needed to generate enough public pressure to make real gains with the minimum wage. In November 2012, 200 fast-food workers staged a walkout in New York City demanding \$15 an hour, the largest strike in the history of the fast-food industry.

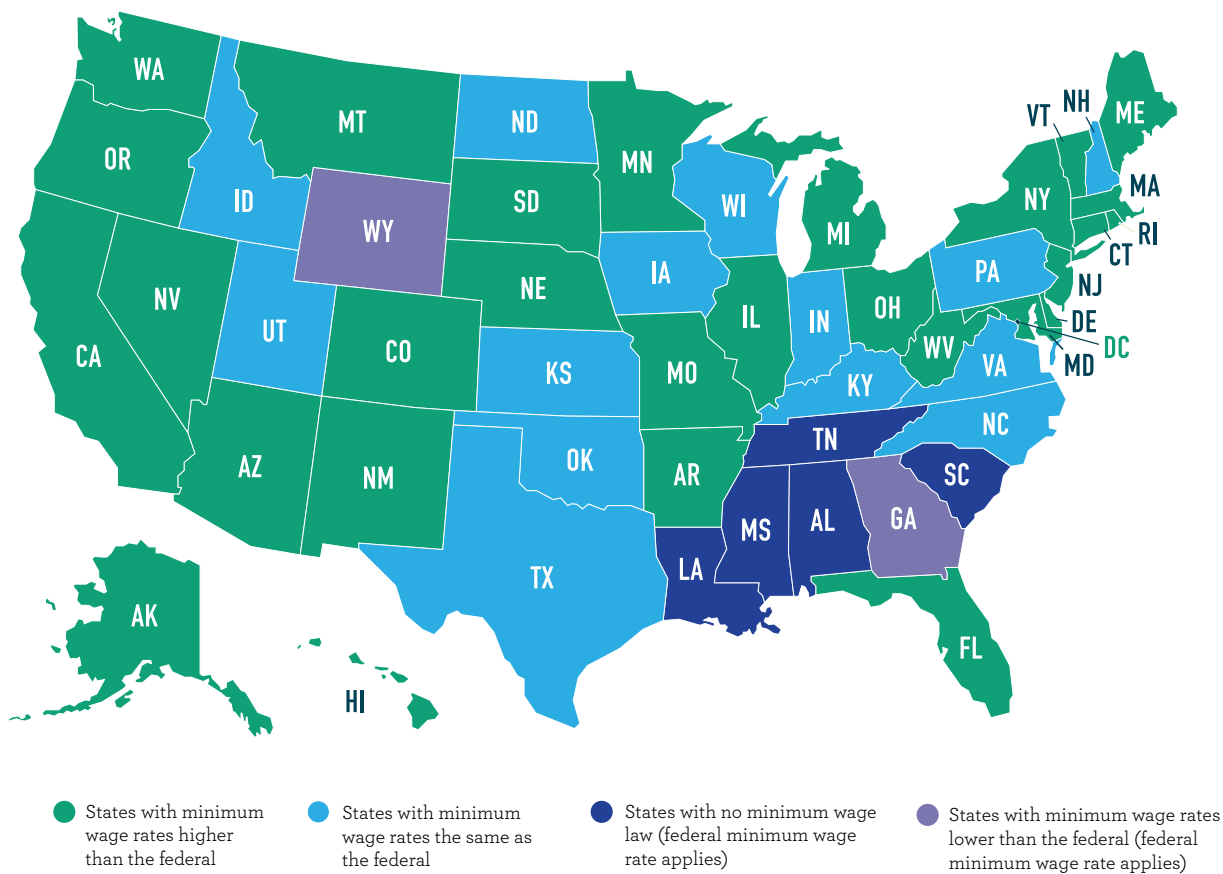
In the months that followed, more strikes were organized nationwide, with a broadened base that included other low-wage, non-unionized workers. Advocates could see that in certain areas, public support for a major increase in minimum wages could be leveraged effectively, despite the lack of widespread national support for a major increase.

Using **values-based** messaging about working people who are simply being paid too little to live — underpaid workers — these local actions paid off. In November 2013, voters in SeaTac, Washington, were the first to approve a municipal ballot initiative to increase the minimum wage to \$15 an hour.

Knowing that a local \$15 minimum wage is achievable inspired new successes in the “Fight for \$15” in Seattle, San Francisco and Los Angeles. By April 2016, New York City and the state of California announced plans to adopt a \$15 minimum wage in the near future. Just as importantly, other states and localities also acted to increase their minimum wages in 2016, often at higher levels than they would have otherwise if the movement’s bar had been set lower than \$15.

The Fight for \$15

Hastening a Tipping Point toward Higher Wages



Minimum Wage Laws in the States, January 1, 2017, United States Department of Labor





“

There's a momentum with these taxes that will be hard for the industry to stop. I expect a year or two from now that the taxes will be widespread.

”

KELLY D. BROWNELL
DEAN, SANFORD SCHOOL OF PUBLIC POLICY
DUKE UNIVERSITY

Photo Credit: OcusFocus

SODA TAXES BUBBLE UP FROM THE LOCAL LEVEL

More than 10 years ago, health advocates working to fight the skyrocketing rise in childhood obesity and diabetes had singled out a villain: sugary drinks like Coca-Cola and Mountain Dew. Big soda companies poured millions of dollars into efforts to defeat local soda taxes — and succeeded in defeating more than three dozen measures around the country.

Fortunately, health advocates have gotten more sophisticated in their messaging, opinion research and geographic targeting. In addition to elevating the voices of trusted messengers like pediatricians and grandmothers about the impact of childhood obesity and diabetes, advocates analyzed the national map to determine where they could win targeted taxes on what they labeled “sugar-sweetened beverages” and “sugar-loaded beverages.”

After passing a soda tax in the liberal San Francisco Bay Area enclave of Berkeley in 2014, neighboring communities followed suit in 2016 with measures passing in San Francisco, Oakland and Albany. The success of the tax in Berkeley — raising much-needed local revenue while cutting childhood obesity rates — helped to negate the fear of unintended consequences among some swing voters in other regions.

With success in four communities in 2016 — three in the Bay Area as well as Boulder, Colorado — advocates are now looking elsewhere on the map, leading *The New York Times* to report, “With that public momentum, a soda tax may be coming to a city near you.”

That same *New York Times* article quoted Kelly D. Brownell, the dean of the Sanford School of Public Policy at Duke University:

There's a momentum with these taxes that will be hard for the industry to stop. I expect a year or two from now that the taxes will be widespread.

The *Times* article also noted that Brownell was ridiculed when he first proposed a “sin tax” on junk food in 1994. A true innovator, Brownell’s idea needed a mapped out diffusion of innovations strategy.



CHAPTER 4

EXPANDING THE POSSIBLE



*In this chapter, you'll learn how strategic smaller steps can lead to big change, with each step expanding the **adjacent possibilities** — a strategic concept we discuss later in this chapter. We'll share how two movements are using a phased approach to shift the way their audience thinks: first, how ocean protection advocates used strategic research and audience segmentation to understand the mindset of millennials and identify a “gateway message” to engage them; and second, how advocates for marijuana legal reform mapped a strategy that began with legalization of marijuana for medical purposes and has led to full legalization of marijuana in a growing number of states.*

SEEKING A NEW GENERATION OF OCEAN SUPPORTERS: A HEARTWIRED CASE STUDY

For environmental advocates today, the future can look...gray.

Donors to environmental causes are aging. Even though many millennials in America hold pro-environment points of view, they aren't joining and donating to organizations in the same way as previous generations. As a result, many organizations face an existential question: *Where is the next generation of support going to come from?* Ocean conservation groups are no exception.

Since its first marine-related grant in 1968, the David and Lucile Packard Foundation has been committed to better understanding our oceans and to making them healthier. Today, while it remains one of the world's largest private funders of ocean conservation, the Foundation is clear about a simple truth: They can't succeed in achieving their goals with their funding alone.

“A lot of our grantees rely on membership,” explained Heather Ludemann, the program officer who leads Packard's work to conserve ocean ecosystems in the United States. “So it's critical that the movement attracts younger and more diverse constituents to grow its base of support.”

Before diving in, step one would be: Make sure we know what we already know by conducting landscape research.

Ludemann and her colleagues recognized that, “Millennials are an incredibly important generation. They are the largest group of people in the U.S. today, and the most diverse generation in U.S. history. Yet, we did not know a lot about this generation's perspectives on ocean conservation.”

To understand the landscape and identify entry points through which grantees could connect with a new generation of supporters, the Foundation enlisted Lisa Dropkin of Edge Research to investigate how millennials think about the ocean and ocean conservation.

Researching attitudes about ocean conservation wasn't new for Dropkin. Over more than two decades as a





Photo Credit: ITU Pictures via Flickr

public opinion researcher, she has worked with some of the biggest names in ocean conservation, including The Ocean Conservancy, Monterey Bay Aquarium, Environmental Defense Fund and World Wildlife Fund.

Given her background, Dropkin knew there was a deep well of ocean conservation opinion research to draw on. The question was, did any of it specifically probe the attitudes of millennials in America?

Before diving in, step one would be: Make sure we know what we already know by conducting landscape research.

“We convened an advisory group including some of our grantees,” Ludemann recalled. “Our grantees had done a lot of polling of their own. We felt a responsibility to ensure that our work would not be redundant with polling that had already been done.”

“Their inclusion and participation was also critical from a buy-in perspective — to ensure that any new insights from the research would build on what we already know and hopefully increase the chances they get applied in the field,” she added.

After reviewing what Packard’s grantees had shared, along with all of the other existing public opinion research she could get her hands on, Dropkin’s suspicions were confirmed.

“We had a lot of wonky knowledge in a few areas that were regionally specific or topic-specific, like marine protected areas or ocean planning. We also had some big sweeping trends about what ‘the American public’ at large thinks about the ocean. But we didn’t have anything about how to engage new constituents in ocean conservation,” Dropkin said.

It was time to better understand the landscape about how millennials actually think about the ocean.

ENGAGING MILLENNIALS IN THEIR NATIVE HABITAT

To tap into the way millennials naturally communicate, Dropkin decided to connect with participants online — an approach that had the added benefit of maximizing the available budget.

Edge started with an **online survey** designed to reveal both overarching trends and relevant audience segments, or groups, within the millennial population.

Dropkin acknowledges that to some observers, “there’s an aspect of our approach to this project that will seem backward. Usually you start with qualitative research, such as **focus groups**, to inform message development, and then end with the **survey** to quantify the audience’s response to those messages.”

In this case, she decided to flip the “usual” order because she knew that identifying the different groups within the millennial audience would be critical.

“This generation is huge. You can’t treat it as a monolith,” she said. Since the budget would only allow for one survey, and the existing public opinion research could inform message development, “we decided to use the survey to identify audience segments.”

RESEARCH METHODOLOGY: BASELINE SURVEY

A useful tool in assessing the landscape, baseline surveys “take the temperature” on an issue to see where people stand. Based on these findings, you can estimate the size and scope of the communications effort required to achieve success. Or, as in this case study, you can analyze the results to determine which populations or subgroups will be most fruitful to include in your qualitative research. As Edge notes, while **surveys** are commonly thought of as a tool to test the messages that you’ve developed once you’re further along in the research cycle, in-depth message testing is not the goal of an early-stage **baseline survey**.





Photo Credit: pkphotoscom

“We grouped our millennials into buckets based on shared attitudes and behaviors,” Dropkin explained. “Five segments emerged, and three of those segments really seemed like they had potential for getting engaged in ocean conservation.”

THREE TARGET AUDIENCES EMERGE

The **baseline survey**, which was balanced for gender, race, ethnicity and geography, revealed several insights in addition to the audience segments. First, the environment was not a top-tier issue for most millennials (defined, for this research, as Americans aged 19-30). Instead, millennials were most concerned with human and civil rights, education and the economy. Climate change was the lone environmental issue that was top-of-mind; the ocean wasn’t even part of the conversation.

However, potential entry points also emerged. More than half of millennials are engaged with causes, with the largest proportion of them involved with animal welfare — suggesting a potential point of connection via messages about animals and marine life.

As Dropkin had anticipated, analysis of the survey data also pinpointed groups within the millennial generation who are not currently thinking about ocean conservation, but could be engaged with the right message.

“We grouped our millennials into buckets based on shared attitudes and behaviors,” Dropkin explained. “Five segments emerged, and three of those segments really seemed like they had potential for getting engaged in ocean conservation.”

The opportunity from these three segments is significant, as together they comprise 64 percent of millennials in the survey. The first group, which Edge calls the “Global Greens” (18%), shared the most conservation-minded and global outlook, but the ocean was not on their radar; climate was their top environmental concern.

The “Coastal Concerned” (26%), outdoorsy types who live near the coast, have an emotional connection to the

ocean and were receptive to messages about a variety of threats to ocean health.

The “Waiting in the Wings” group (20%) were the youngest: active, outgoing and engaged with social causes. They had little information about the ocean, but were excited by what they learned in the process of taking the **survey**.

RESEARCH SUBJECTS BECOME THE RESEARCHERS

Edge then recruited 25 millennials who fit the profile of each of the three promising subgroups to participate in a unique experiment. The goal: to understand how millennials might work through these problems with their peers, without being constrained by what the ocean conservation community thinks are the most pressing problems or the right solutions.

“We built three different **online communities** — one for each of our most promising audience segments — and talked to them over a three-week period about the oceans and ocean issues,” Dropkin said.

Participants posted daily in a Facebook-like environment, sharing photos, videos and ideas in response to each other and to questions from Edge.

Over the course of the three weeks, Edge challenged the participants to go online and do their own research on problems facing the ocean, bring their findings back to the group and make the case for why specific problems matter. Each group then selected one problem to focus on and developed a “big idea” for a campaign to engage their peers. All the while, Edge analyzed the messages, arguments and images the participants found compelling and chose to incorporate into their campaign concepts.





During three-week online discussion groups, Edge asked research participants to share photos and videos that spoke to them as they learned about the threats facing our ocean. This photo is similar to those submitted by participants, which touched on two key connection points that emerged in the research: animals and marine life, and visible pollution — like litter and cigarette butts — that millennials can see in their own experiences at the coast.

Photo Credit: Ingrid Taylor via Flickr

THE GATEWAY MESSAGE

The Foundation set out to identify ways to engage millennials in supporting ocean conservation. Several significant insights emerged — the importance of a personal connection to nature in their formative years; the emotional impact of wildlife images; and, a willingness, if inspired, to make changes in their own lives to lead a more “ocean-friendly” lifestyle. Yet, the real key was this:

“Millennials were interested in what they can see and the intersection with their own lives,” says Dropkin. “Much of their interaction happens at the beach, so they see plastic pollution and cigarette butts.”

CONCEPT CATALYST:

THE ADJACENT POSSIBLE

When it comes to the challenge of making progress toward long-term change goals — while understanding how values and lived experience might limit your near-term progress — ocean conservationists aren’t alone. So what do you do if your analysis reveals, like Edge’s did, that your audience simply isn’t ready to make the mental leap into a conversation about “the real issues,” or if you discover that the change you ultimately seek to enact is not possible at this time or with the resources at your disposal?

Like ocean conservation experts, who know that the real solutions are addressing big-picture issues like

That was especially true for the largest group, the Coastal Concerned. One outdoorsy 30-year-old from California expressed the connection this way:

I always see people throwing cigarette butts out of their car, and it makes me so mad. They go into storm drains directly to the ocean. Also, every time I went to the beach with my kids this last summer, there were cigarette butts everywhere in the sand.

While pollution and plastic trash are not top priorities for many ocean conservation groups, these visible threats could be an effective way to get millennials — who aren’t currently thinking about the ocean at all — engaged in a conversation that then leads them to begin taking action to protect the oceans.

Once they’re fired up about the need to protect the ocean, and believe their involvement can make a difference, advocates can educate them about other issues, such as overfishing and ocean governance, that have an even greater impact on ocean health.

At least, that’s the current hypothesis. As of this writing, Packard and Edge are undertaking further research into millennials’ attitudes toward the ocean and the messages that may persuade them to become active supporters of ocean conservation efforts.



To learn more about the research completed to date, to read the report, or to watch the webinar hosted by Edge and Packard, visit www.packard.org and search for “millennials.”

overfishing and the management of ocean resources, you may discover that you have to *begin* by engaging your audience in a stepping-stone conversation about an issue that’s more relatable, though less impactful, like plastic trash and cigarette butts on our beaches. Once they’re engaged in that initial conversation, new conversations become possible.

This step-by-step approach leverages what Steven Johnson calls the **adjacent possible**, a concept he adapts from evolutionary biologist Stuart Kauffman. The concept is described in Johnson’s book, *Where Good Ideas Come From*, and represents a helpful way



to consider and explore the pathways forward and the steps needed to get there. Johnson posits that while “we have a natural tendency to romanticize breakthrough innovations... [ideas] are, almost inevitably, networks of other ideas” that must evolve gradually, with each new innovation or insight opening up new possibilities that did not exist before.

Johnson invites us to envision the primordial soup of life: its molecules can collide to form water, proteins and sugars. However, “creating a sunflower...relies on a whole series of subsequent innovations: chloroplasts to capture the sun’s energy, vascular tissues to circulate resources through the plant, DNA molecules to pass on instructions to the next generation.” The first set of combinations is “the adjacent possible”: You can’t skip over them, but as each possibility comes into being, a whole new set of possibilities opens up. You can go from the primordial soup to human beings — but not without all the necessary intervening stages of development. The adjacent possible describes the “first-order combinations” and the concept “captures both the limits and creative potential of change and innovation” that is available at any given moment.

The strange and beautiful truth about the adjacent possible is that its boundaries grow as you explore those boundaries. Each new combination ushers new combinations into the adjacent possible. Think of it as a house that magically expands with each door you open. You begin in a room with four doors, each leading to a new room you haven’t visited yet. Those four rooms are the adjacent possible. But once you open one of those doors and stroll into that room, three new doors appear, each leading to a brand-new room that you couldn’t have reached from your original starting point. Keep opening new doors and eventually you’ll have built a palace.

The same principle applies to efforts to change attitudes, policies and behavior. Development of your change hypothesis and subsequent research can clarify the path forward by revealing your audience’s current attitudes and the circle of adjacent possibilities they may be ready for next.

Let’s talk about how another movement has used the adjacent possible to enact big change that, quite recently, seemed nearly impossible.

REFORMING MARIJUANA LAWS: HOW STRATEGIC SMALLER STEPS ARE LEADING TO BIG CHANGE

A decade ago, opinion research showed that a majority of people in any given state were not yet ready to vote to legalize marijuana. Without the public will, state legislatures would not do so either.

There were different segments of voters who were initially supportive, as they **believed** that marijuana use was no more risky for adults than alcohol. Yet their support quickly turned to opposition when anti-legalization forces triggered certain concerns or fears. For example, some women, due to their **lived**

experiences, shifted away from support once opponents delivered claims about harm to children from expanded marijuana access. The only way to hold the support of these women was to reduce their reactivity to claims of harm from unintended consequences.

Despite some roadblocks, advocates saw several potential viable pathways towards marijuana law reform. One was legalizing “medical” marijuana, a path that advocates pursued in certain key states, including through the ballot box.

These steps opened up a new adjacent possibility that had not been there just a few years earlier — that voters in a variety of states would vote to legalize marijuana for recreational use.

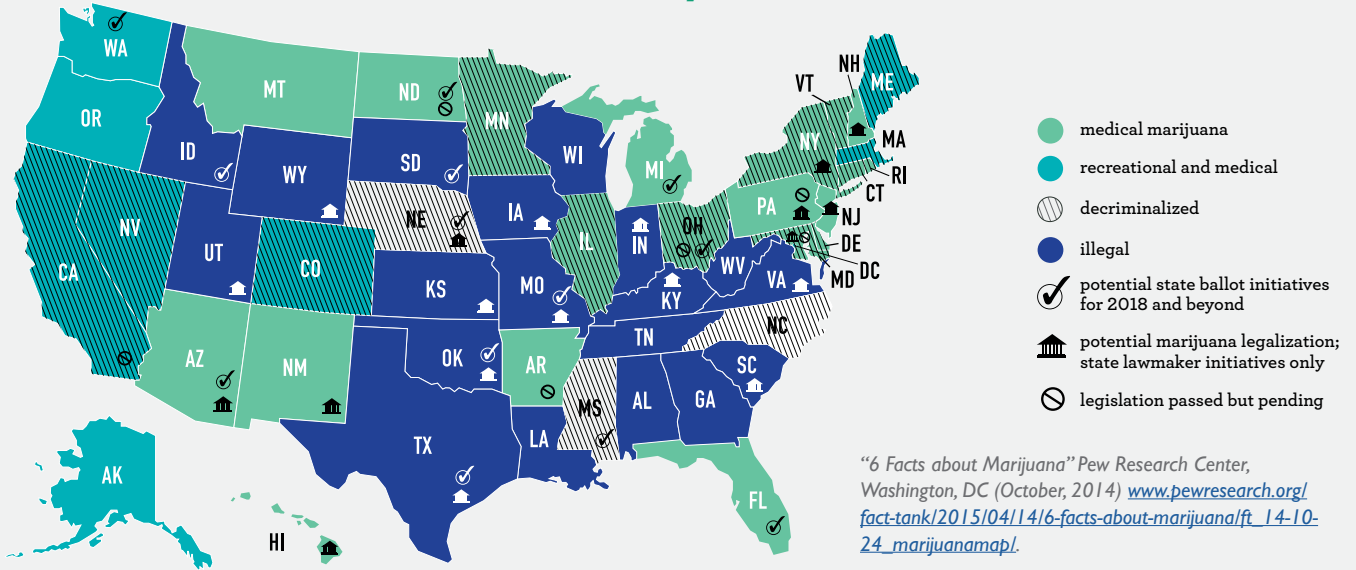
There was another potential step short of full legalization. Decriminalization would diminish the penalty for using marijuana, building on a growing public sentiment that while many did not feel comfortable legalizing marijuana, they also did not feel people should suffer serious legal consequences if they were caught smoking a joint.

The movement succeeded in passing medical marijuana laws or decriminalizing it in several states,



MARIJUANA LEGAL REFORM

How Advocates Expanded the Possible



often using ballot measure campaigns. As people started to learn about the medical benefits of marijuana and as recreational marijuana use was decriminalized in certain states, the idea of full legalization began to seem less risky. Marijuana was being used, and the sky had not fallen.

These steps opened up a new adjacent possibility that had not been there just a few years earlier — that voters

in a variety of states would vote to legalize marijuana for recreational use.

Building on those initial changes, full legalization was put to a vote in Washington and Colorado in 2012. Both measures passed, and legal punishments and bans on marijuana use are continuing to ease or be lifted entirely in a range of states, including through successful state ballot measures in 2014 and 2016.

PUTTING THE ADJACENT POSSIBLE TO WORK FOR YOU

Thinking about what's necessary — and possible — can help you set achievable goals in the short term, while also laying the foundation for more substantive social change over time.

The kind of success advocates for legalization of marijuana have had over the last decade makes a case for accelerating change through putting the adjacent possible to work in other arenas, too. So how do you map your own path to success through the adjacent possible?

When it comes to your own issues, consider: *What are your audiences' current beliefs and attitudes, and what are the limits and possibilities for change at this time, given those beliefs? What views or attitudes are they capable of holding instead, given where they are now?*

As you explore these questions, consider how much change is truly required to achieve your goal. Do you need to align the audience's **beliefs** fully with your own or is it enough to neutralize the impact of some opposition claims on your audience? Changing **values** can be a generation-long effort, but certain policy changes can often be effected much faster.

Thinking about what's necessary — and possible — can help you set achievable goals in the short term, while also laying the foundation for more substantive social change over time.



MAKING CHANGE: SLOW LANE? FAST LANE? TEAR DOWN THE FREEWAY?

Advocates often ask whether pursuing a specific near-term win undermines long-term change goals.

THERE ARE TIMES WHEN SHORT-TERM CHANGE CAN LAY THE FOUNDATION FOR LONG-TERM CHANGE.

When it comes to social change, working for an incremental change can feel like being stuck behind an overly-cautious driver going 10 miles below the speed limit. Some change-makers understandably want to move into the fast lane. Others may feel like the system is so broken that it's time to tear down the freeway altogether.

Those are legitimate debates to have within a social-change movement. Specifically, it's important to ask

which short-term changes lay the groundwork for longer-term change, and which short-term changes are not worth all the hard work and resources they'd require to enact — or may even cause harm. Those discussions can lead to a do-no-harm bottom line that guides your strategic decisions about which changes to pursue and how best to pursue them.

There are times, however, when short-term change can lay the foundation for long-term change.

An important question to ask is this: Where do we want to be in 10 to 20 years? What do we want to show for all of our blood, sweat and tears? If a short-term/long-term approach will allow you to make progress without causing harm, it's worth considering as a pathway forward to accelerate social change.

WHAT ABOUT RADICAL OR DISRUPTIVE CHANGE?

Black Lives Matter, ACT-UP (AIDS Coalition to Unleash Power), radical feminism, Freedom Riders, civil disobedience at nuclear weapons facilities. At many moments and places, real change has required disrupters of the system, radical movements, collective action or in-your-face tactics and leaders to generate deeply-needed change because of the life-or-death circumstances facing people and communities. Working within a system can be insufficient to create real change when the system is corrupt, broken, deeply unjust, historically discriminatory, stalled or in any other number of ways plainly wrong.

There are many ways to create social change. This guide addresses one of the approaches to making change, working within existing legal and policy systems in a democratic society with certain constitutional protections. We do not in any way intend to invalidate the many other effective ways in which people create positive social change around the world.

We do hope that this guide facilitates rich discussion among change-makers that may help them to be even more effective in the important work they are doing.



Photo Credit: Lorie Shaull via Flickr



CHAPTER 5

CHANGE FROM THE INSIDE OUT



*In this chapter, you'll learn about how abortion rights advocates were able to defeat a measure that would have outlawed abortion in a state where voters overwhelmingly identify as "pro-life." We'll also dive deeper into the **applied psychological approach**, which focuses on creating change from the inside-out rather than the outside-in. You'll learn about the importance of **empathy** as well as how to craft heartwired rebuttals to arguments raised by opponents.*

WINNING WHEN 80% OF VOTERS ARE PRESUMABLY AGAINST YOU: A HEARTWIRED CASE STUDY

Is it possible to defeat an anti-abortion ballot measure in a state where 80 percent of voters — Democrats *and* Republicans — **identify** as "pro-life"? What if, on top of that, both the Republican and Democratic candidates for governor were supporting the measure?

Those were the questions abortion rights advocates were forced to grapple with in 2011.

That year, opponents of abortion rights succeeded in collecting enough signatures to put a constitutional amendment on the ballot in Mississippi. Initiative 26, which declared that life begins "from the moment of fertilization," was so extreme that it would ban some forms of birth control and virtually all abortions, even in cases of rape, incest or to save the life of the pregnant woman.

Political prognosticators and early polling data showed pro-choice advocates had little chance of defeating the measure in a state as culturally and religiously conservative as Mississippi. In examining the political landscape, abortion rights supporters weren't sure they could turn the tide in a state where voters so overwhelmingly identified as being pro-life.

"Opponents of abortion rights in Mississippi have demonstrated that they are willing to manipulate **values**



Public opinion research shows that Mississippi voters are among the most religious in the nation with over 80% identifying as pro-life.

Photo Credit: ehrlif

around faith and family," said Felicia Brown-Williams with the Mississippians for Healthy Families campaign.

Despite the odds, pro-choice advocates decided to do their best to defeat the initiative — or to at least make it a close race. They turned to psychologist Dr. Phyllis Watts for help.

Watts is calm and often refers to something she likes as "swell." Her involvement in hard-nosed campaign politics would seem to be an odd mix.



After decades as a successful consultant and clinical psychologist, Watts had begun advising reproductive rights advocates just seven years before on efforts to defeat anti-abortion measures at the ballot box.

She's succeeded because she's an effective iconoclast. Watts has the ability to observe things in people that most others miss and convince leaders to shift their strategic approach accordingly. She's advised progressive advocates on some of the hottest issues of the day — from marriage for same-sex couples to medical aid-in-dying for terminally ill people.

Her work often begins with listening — either observing voter **focus groups** or leading in-depth **psychological interviews** with one or two interviewees on especially controversial subjects where social desirability bias might inhibit the individual from honestly sharing their feelings. She has an uncanny gift for listening to voters, watching their body language and understanding the genuine unspoken conflict and anxiety floating below the surface in their subconscious minds.

On her first trip to observe focus groups in Mississippi, just two months before Election Day, Watts understood that convincing Mississippi voters to reject the measure would be a daunting challenge.

“We had a focus group with a group of women who were all white, older, conservative and all regular churchgoers,” Watts recalled. “It was so clear to me in watching the focus group that they did not support the measure. But they couldn't figure out how they could oppose it either. Every woman kept looking at someone else to speak. Who would be the first person to break rank?”

The challenge, according to Watts, was that most Mississippi voters saw themselves as pro-life and as God-fearing Christians.

“One woman, with such a sweet, Southern nature said, ‘I really, really want to vote ‘no,’ but what happens when I get to heaven and all the babies are waiting for me there?’”

The opposition capitalized on that fear of God's judgment.

“Our opposition said things like, ‘We won't be in the voting booth with you, but God will be there, God will be watching you,’” Watts recalled.

She added, “If you are a Christian who sincerely believes in hell and in a God who punishes, that is very, very

scary. And, if I had those beliefs, I would be afraid of voting no as well.”

Watts understood that the campaign needed messages that allowed pro-life voters to feel they could remain pro-life and vote against the measure.

The campaign developed TV ads based in part on Watts' analysis. The ads began by reminding voters how extreme Initiative 26 was.

In one ad, Angela Worthy, a nurse said:

Twenty-six will keep a pregnant woman with cancer from getting the care she needs. Twenty-six makes no exceptions even if a woman has been raped. And it will ban birth control pills.



Another ad features Cristen Hemmins, a rape survivor who said:

I was just a normal Mississippi girl going to college. And then I was abducted and raped. It changed everything. Initiative 26 doesn't make any exceptions for rape or incest.



Both ads ended with the messenger delivering some version of this message:

It is perfectly acceptable to be pro-life and to be against Initiative 26.



“We did not try to interfere with people’s deeply held **beliefs** about being pro-life,” said Watts. “We needed to ask people, ‘What does it mean for you to be pro-life?’ That is what we did.”

Because the measure would make it difficult, if not impossible, for a pregnant woman experiencing a life-threatening illness to get treatment, Watts understood that the campaign could leverage their pro-life **identity** as a reason to vote against the measure.

“Pro-life voters searched their hearts and prayed as well and came to believe that God would not want a mother to die just because she has a life-threatening pregnancy,” Watts reflected.

“We even named the campaign ‘Mississippians for Healthy Families’ to make it clear that this was about the health and well-being of women and their families,” Watts added.

Two weeks before Election Day, polls and political observers predicted that the measure would pass easily. On October 25, 2011, *The New York Times* wrote:

“The amendment has been endorsed by candidates for governor from both major parties, and it appears likely to pass,” said W. Martin Wiseman, director of the John C. Stennis Institute of Government at Mississippi State University.”

On Election Day, pundits were shocked to report that Initiative 26 went down to a solid defeat. Mississippi voters — the vast majority of whom identified as pro-life — soundly rejected the measure by 16 percentage

points, 58 percent to 42 percent. On Election Night, *The New York Times* reported:

One of the biggest surprises of the night was Mississippi’s rejection of a far-reaching and stringent anti-abortion initiative known as the ‘personhood’ amendment, which had inspired a ferocious national debate.

Successful campaigns are rarely the result of a single individual. The successful effort in Mississippi was no exception. Abortion rights advocates brought together talented individuals and firms to develop effective voter contact strategies and TV advertising. Advocates contributed the funds necessary to run a successful operation.

In the middle of it all was a psychologist who helped the campaign think differently about their voters and who they really were as people. Through seeing them as real people with their own identity, which included being pro-life, the campaign was able to develop persuasion strategies so that voters could remain pro-life and still vote no.

In reflecting on the Mississippi victory and others she has been part of, Watts had this to say:

“You don’t change people by trying to make them accept your values and your way of looking at an issue,” said Watts. “A good psychologist would never consider trying to change someone’s values.”

The good news is it is still possible to win on the toughest issues of the day, even in the face of seemingly impossible odds.

CONCEPT CATALYST:

CHANGE THAT HAPPENS FROM THE INSIDE OUT

USING THE APPLIED PSYCHOLOGICAL APPROACH TO CREATE LASTING CHANGE

The persuasion messaging work to defeat the anti-abortion measure in Mississippi is an example of the **applied psychological approach** developed by Dr. Phyllis Watts. Her work on socially controversial issues began years before in 2003.

That year, Kathy Kneer, the president of Planned Parenthood Affiliates of California (PPAC), was concerned. Abortion rights opponents were organizing a possible ballot measure that would require pregnant minors to notify their parents before terminating a pregnancy.

Advocates for women’s health understood that it would cause desperate minors to do desperate things. Kneer




feared that California voters — even the majority who were solidly pro-choice — would support the measure.

She asked Watts, who had been consulting with PPAC as an organizational psychologist, to review their existing public opinion research and possible messages to defeat the measure. Watts, who had been working as a clinical and organizational psychologist for 25 years, had never done message consulting on political or social issues.

Nonetheless, Watts agreed to take a look at their research and messaging. Understanding the complex psychology of human nature with a focus on how people weigh and ultimately make decisions on emotionally complex issues, Watts saw that messages PPAC was considering would likely fall on deaf ears.

“One of the things I know is that when a person genuinely changes, it is from the inside out,” Watts said. “In politics, that means real, lasting change happens when communications give voters an opportunity to use their own **identity**, their own way of thinking and their own **values** to sort through an issue and arrive at a thoughtful decision.”

 **One of the things I know is that when a person genuinely changes, it is from the inside out,” Watts said.**

“The messages I reviewed were focused on trying to change people’s values rather than working with their existing values,” Watts added. “To be honest, this is how too many progressive advocates communicate with their target audiences — to try to convince them they are wrong, that they need to see the world in the same way the advocates already see the world. That’s trying to create change from the outside in.”

From that moment, Watts went on to develop what she calls the applied psychological approach, a research methodology focused on understanding target audiences on a deep, psychological level in order to understand how issues align with their identity, values and lived experiences.

Watts went on to develop what she calls the applied psychological approach, a research methodology focused on understanding target audiences on a deep, psychological level in order to understand how issues align with their identity, values and lived experiences.

“What others call ‘messages,’ I call a “psychological intervention,” said Watts. “I listen to audiences talk about their lives — to really understand them at a deep level. How do they see themselves? What do they care about? What are their hopes and dreams? What are their greatest fears and how do all of those dynamics intersect with our issue?”

The applied psychological approach is integrated into every phase of research from **focus groups** and **media audits** to **survey** design. Watts also leads in-depth **psychological interviews** to better understand how a target audience member relates to an issue relative to their sense of self and lived experience.

In the process, she sees the ways in which a person’s identity and values influence their feelings and thinking on an issue. Watts understands the power of nuance in both listening to and communicating with target audiences.

“By insightfully watching and listening to voters, I am able to interpret what is happening inside of them — and the ways in which an issue is creating internal conflict as they weigh different competing values they hold,” said Watts.

She also sees the ways in which that conflict can be used as an opportunity by advocates.

“Fundamentally, people have a deep psychological need to see themselves as good,” said Watts. “If a person believes that their position on an issue will cause other people pain and suffering, it will conflict with their need to see themselves as fundamentally good.”

Watts has used the applied psychological approach to help advocates succeed on some of the toughest social issues of the day — from abortion rights to the freedom to marry for same-sex couples to increasing support for people who are transgender.



Empathy for your audience

Empathy is a core concept for change-makers: having the capacity to listen to and seek understanding through the prism of your audience's good intentions is vital to persuasive communications.

That's because nearly all humans have a deep psychological need to see themselves as good, and very few want to see themselves as harming others.

We better understand our audiences' attitudes and behaviors when we understand how they experience their beliefs and actions as supporting a positive view of their own intentions.

Reproductive rights advocates in Mississippi had to empathize with voters who identified as pro-life in order to defeat a draconian measure that would outlaw all abortions in the state. Empathy does not require that you agree with a person or their point of view. But the practice of empathy, as a heartwired research tool, means beginning from the premise that, in their own way, people mean well.

Now, we are often asked, "Yeah, but what if the values and beliefs of your target audience suck?" It's a fair and important question and we tackle that topic in *The Practice of Deep Listening*.



Photo Credit: Pierre Phaneuf via Flickr

"When the change comes from the inside, it is more fundamental and is more likely to stick because it is based on people's existing **values** and how they see themselves," said Watts.

That's been good news for her clients.

Watts has worked closely with Kathy Kneer of Planned Parenthood Affiliates of California to defeat three ballot measures that would have required pregnant minors to notify their parents before terminating a pregnancy. There have been many other victories. Eighty-five percent of the ballot and legislative fights that Watts has advised have been victorious.

Having had a successful impact on many hard-fought campaign fights, advocates are now turning to Watts to help them create organizational and movement buy-in for the message interventions that she helps to develop.

"Advocates often think that the most difficult part of this work is finding a message approach that will resonate with the target audience," said Watts.

"Honestly, the most challenging part of this work is helping advocates to walk a mile in the shoes of their target audiences. Without this step, advocates will either reject the new messaging outright or simply revert back to old, familiar ways of communicating," Watts concluded.



HEARTWIRED REBUTTALS: RESEARCH IN AN OPPOSITION ENVIRONMENT

On virtually any issue where you seek change, you are not a one-way communicator.

For some issues, the opposition point of view may be nascent and not yet publicly voiced.

In this context, the real ‘opposition’ is comprised of the concerns, fears or anxieties that the change you are seeking generates in your audience.

Understanding the roots of those inherent concerns is critical to developing effective messaging that calms them and enables your audience to move to support your position.

Other times, advocating for your issue means you are engaged in an intense dialogue and debate with opponents who have very different feelings about your issue and who forcefully press their point-of-view. Their opposition often builds on people’s own existing fears or concerns about a change you are seeking.

Regardless, you should always ensure you understand the impact of opposition messaging on your target audience, and develop effective heartwired rebuttals to their attacks — that is rebuttals that reflect your audience’s **identity**, **values** and **lived experiences**. To win in an engaged public debate, you need to respond to the **emotions** your opponents are triggering.

Sometimes that means communicating facts, but more often it involves understanding the deeper concerns that your opponents are triggering and responding to those deeper issues, rather than engaging in a tit-for-tat debate on your opponent’s claims.

For example, in the fight for the freedom to marry for same-sex couples, opponents argued that legalizing marriage for same-sex couples would mean elementary school children would be taught “gay marriage” and “subjected to graphic homosexual sex instruction” — running ads to bolster their claims.

Research revealed that these claims elevated anxiety among some segments of parents that children may be taught values at school that conflict with values taught at home. Rather than engage in a fact-based rebuttal, advocates countered opposition attacks with an emotional rebuttal that helped to ease this anxiety by reminding parents of what they already know and believe: that kids learn many things at school, but they learn their most important values at home from their parents.

Failing to understand the emotional dynamics at play in an opposition environment means your messaging approach will be incomplete. It will fail to calm the anxieties and concerns of your audience enough to enable them to support your position.



In this context, the real ‘opposition’ is comprised of the concerns, fears or anxieties that the change you are seeking generates in your audience.

Photo Credit: CC0 Public Domain



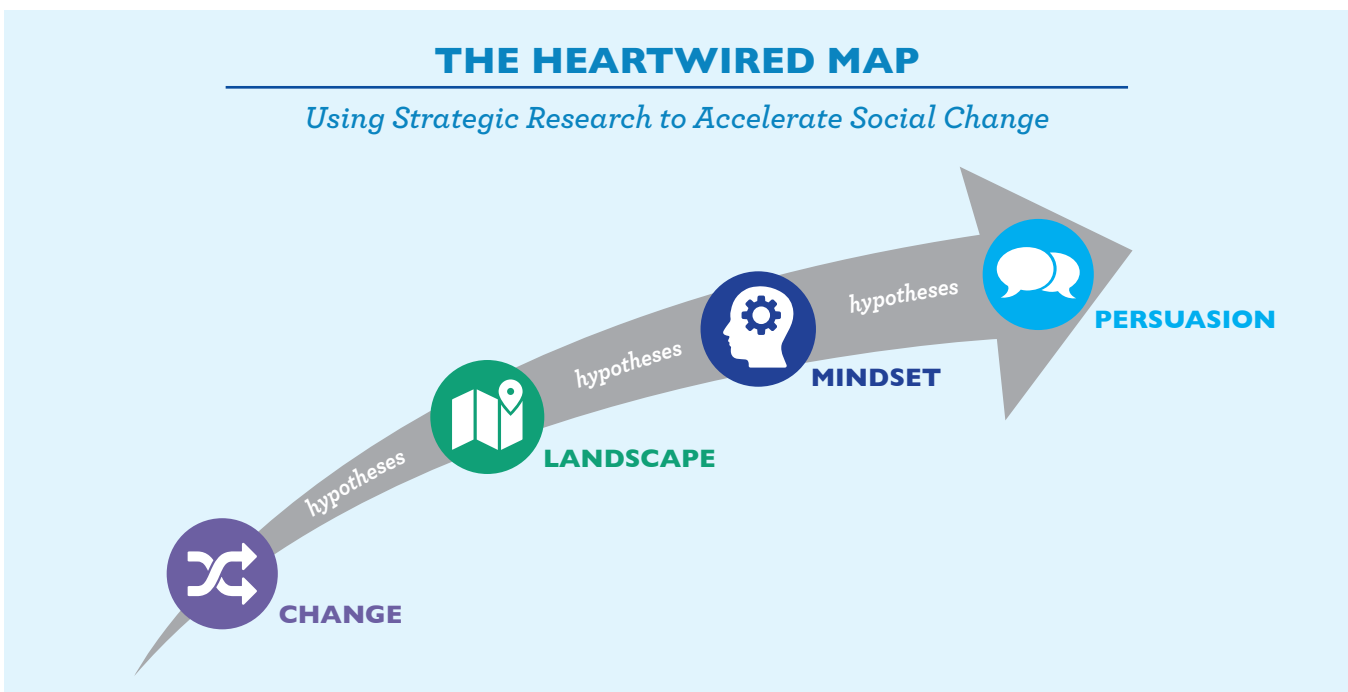
CHAPTER 6

THE HEARTWIRED MAP



In this chapter, we describe the research cycle — an iterative process that can be applied to any research-informed communication effort, no matter how broad or narrow in scope. We describe how insights from each phase lead to revisions in your hypothesis that you test in the next, and offer examples of research tools to use in each phase.

USING STRATEGIC RESEARCH TO ACCELERATE SOCIAL CHANGE



Whether you are conducting a single survey or launching a long-term social change campaign that may take years and require deploying many different research methods, applying the process outlined below will help ensure that the resulting research findings and communication recommendations best support your objectives.

This research process includes four phases that are interconnected and on-going.

Begin by developing initial hypotheses about the change you want to create. These change hypotheses are then continually explored, tested and refined each step of the way. In some cases, your research findings will





For even more descriptions of the range of research methodologies that can be employed for social change, see The Heartwired Research Toolbox at heartwiredforchange.com/toolbox

suggest revising your change objectives significantly or embarking on an altogether different (but often related) pathway to creating change.

Throughout the research process, it is critical to both identify and question your own assumptions, with each assumption being checked and confirmed, refined or abandoned along the way. In addition, we find that creating effective “external” change also requires creating “internal” change, by building buy-in among colleagues and coalition partners and incorporating their feedback during the research process. Otherwise, final message recommendations will not be widely adopted or implemented. Importantly, advocates and coalition partners must be considered from the beginning and throughout the research and message development process.

In this chapter, we will dig into the four research phases introduced earlier, and provide examples of research methodologies that can be used to answer the strategic questions that guide each phase. To recap, those key questions are:

CHANGE: What is the specific change you want to enact in the world?

The freedom-to-marry movement developed the 10/10/10/20 framework as their vision of change, which they translated as: In the next 20 years, winning equal marriage rights in 10 states; civil unions in 10 states; relationship recognition for same-sex couples in 10 states; and at least some pro-equality organizing in the final 20 states.

LANDSCAPE: What is the current landscape, or the playing field on which you have to compete, to create the change you seek — and what is already known about it?

Recall that in the millennials case study, the research team conducted an extensive review of existing public opinion research to ensure their work would not be redundant with polling that had already been done. They also tapped into a group of Packard Foundation staff, grantees and partners to get their buy-in from the beginning of the project.

MINDSET: What is the mindset of the audiences who you need to persuade?

Research for the Robert Wood Johnson Foundation explored conscious and unconscious biases as a way to understand how to build support for programs and policies to improve the health and success of young men of color.

PERSUASION: What is the most effective approach to persuading your audiences in a way that reflects *their* values and lived experiences?

Mississippians for Healthy Families was able to defeat an extreme anti-abortion ballot measure in the state by communicating the message that “it was perfectly acceptable to be pro-life and to vote against Initiative 26.”

The case studies earlier in this guide demonstrated the transformative power of each of these questions. Now let’s talk about how you can answer them for your own work.





CHANGE

MAP YOUR CHANGE

Before you even begin your research, it is critical to answer a series of fundamental questions that will both guide your research and help you think through what implementation might look like once the research is complete (or, because the process is iterative with each phase building on the findings from the previous phases, if additional research is required).

The primary question to pose at this initial stage is: *What is the concrete change you are seeking?* This “Change” question is pivotal and should be fully articulated and answered before the research process begins. There are numerous ways to do so, such as through a facilitated discussion among your organization (staff, board, major donors) or with movement leaders if you are seeking to build a larger coalition.

With your Change answer in hand, you then develop a set of initial hypotheses of how to make that change happen based on what you know about the lay of the land. For example, you must develop hypotheses about *which* attitudes you need to impact for that change to occur, *who* are your potential persuasion or activation audiences, and *what messengers* do they need to hear from to be persuaded.

It is important to note that your initial change hypotheses often evolve in response to what you learn as you undertake each phase of your research. As you develop a deeper understanding of your audience, you should revisit and reconsider your change hypotheses and see if and how they need to be amended.

STRATEGIC QUESTIONS

As you think about these strategic questions and develop hypotheses about how to answer them, it may be helpful to think about the case studies presented throughout this guide. In each case, the research was shaped by a set of initial hypotheses about what was necessary — and possible — to create change. While this process can be time-consuming — especially when hard deadlines necessitate an urgent need for research — we find it critical to ensure that the research conducted



STRATEGIC QUESTIONS

What is the concrete change you are seeking?

What is the change you ultimately want to see in the world?

Are you seeking to change attitudes, policy or both?

What will success look like? How will the world be different if you are successful?

What are the changes you can win at this time that will move you toward your long-term social change goal?

How might change happen?

Who are the influencers?

What are the opportunities and barriers to change?

What other kinds of recent social change might offer guidance?

Who are potential persuasion targets?

Who do you need to persuade, activate or neutralize to achieve your goal?

What makes you think these are the audiences who need to be persuaded?

What hypotheses do you currently have about your target audience's attitudes, beliefs and values — either based on previous research or experience?

What leads you to think you can persuade these audiences to do what you need?

How can you maximize your opportunities?

What more could this research accomplish or help you learn?

Will there be opportunities to revisit and tweak your message based on real-world circumstances (e.g., based on debriefing with canvassers to determine what worked or measuring the level of response on social media)?

What are your means or modes for communicating? How will the messages you're developing ultimately be used?

How practical are your research and implementation goals?

What is your budget for research vs. communications?

What is your timeframe and potential for repetition of your message over the long term?



Communication Audit in Action

A coalition focused on combating diseases linked to environmental exposures wanted to increase the effectiveness of their communication.

Consultant Ryan Schwartz used an audit of their members' communications to shine a spotlight on a critical issue: Nearly all organizations in the network were framing their message solely in terms of "health" outcomes, even though their goal was to address *environmental* causes of disease. The "health" frame was creating a barrier to audiences accurately understanding the issue and taking appropriate action because the idea of "health" triggered people to think about individual actions like diet and exercise, rather than environmental factors outside of our control.

In addition, the communication audit revealed that most of the coalition's messaging was in the passive voice — "chemicals are put into our products" and "restrictions have yet to materialize" — without naming who needs to take action in order to address the problem.

With that fresh lens on their communication, the network was able to develop a new approach to telling their story — one that made it clear how these problems were created, and by whom.



and resulting communications recommendations are aligned with the overall strategic objectives of your effort. Asking strategic questions and developing research hypotheses can also help reveal critical assumptions and barriers to progress. In the freedom-to-marry case study, for example, initial hypotheses had to be revised significantly based on in-depth public opinion research as well as by political, social and communications realities on the ground.

The strategic questions on the previous page are offered as examples to help guide your hypothesis development. You should answer as many of these questions as you can initially, and then continue to revisit them as you conduct each phase of your research.

EXAMPLE RESEARCH METHODOLOGIES

You're ready to explore your Change hypotheses. What research methods should you use? Some look *internally* at communications within your organizations or movement. Others focus *externally* on audiences or communications from opponents or other actors (e.g. media or government).

FACILITATED DISCUSSIONS WITH ADVOCATES:

If you're considering a coalition or movement-wide effort to advance your issue, you can benefit by hearing the perspectives of other advocates, particularly what has and has not worked in their own research, communication and organizing efforts. These sessions offer advocates a seat at the table to help unearth message opportunities and challenges and to begin to develop a shared vision for the change you wish to make in the world. These facilitated discussions, which should be led by an outside moderator, should focus on identifying attitudinal barriers to change.

COMMUNICATION AUDIT: A fresh look at your own external communications — from websites and social media to advertising and speeches — is critical to assess how you currently communicate about your issue. The audit can also help you assess the clarity and effectiveness of your message. Once you've completed your audience and message research, you can identify what to keep, what to let go of and what to refine. After your new communications approach is in place, the audit can also serve as a baseline analysis to help measure the changes in your communications.





LANDSCAPE

UNDERSTAND YOUR LANDSCAPE

Ready to map the current landscape? Landscape research enables you to understand how your audience is experiencing your issue. You will develop your initial hypotheses and refine them based on what you learn. The overarching question to pose in the Landscape phase is: *How are your audiences currently experiencing and reacting to communications about this issue?*

RESEARCH GOALS

Important research goals for this Landscape phase include:

- ✓ Mapping the mental templates of your target audiences (a critical undertaking that will continue in the Mindset phase);
- ✓ Identifying the message frames, words, images, metaphors, associations and emotions currently being used to communicate about your issue;
- ✓ Analyzing current narratives and stories about your issue, both in terms of their construction and how they are used; and
- ✓ Leveraging learnings from existing public opinion research that has already been conducted on your issue.

EXAMPLE RESEARCH METHODOLOGIES

There are many Landscape research methodologies that can achieve the research goals above. Similar to Change methodologies, some focus *internally* on communications within your organization or movement. Others look *externally* to how target audiences, opponents or other external actors (like the media) think and talk about your issue.

PEER AND COMPETITOR COMMUNICATIONS AUDIT: Before developing a communications campaign, it's important to understand the context in which your message will be received. In reaching out to your audience, what psychological obstacles are

standing in the way? What message frames, including from allies, are shaping your audience's reactions? Do those messages complement or undermine your own? What is your unique role in the conversation? Reviewing the external communications materials of other influential advocates and opinion leaders on your issue, and mapping out where each organization, including your own, falls in relation to the others, can help you better understand the lay of the land.

MEDIA AUDIT: The media is both an influencer and a mirror of public opinion. Analyzing coverage and existing message frames of your issue — pro, con and neutral — allows you to: identify the message frames that dominate the conversation; the advocates and opinion leaders who give voice to each perspective; and what biases may be embedded, even unintentionally, in the language journalists use to report on the issue.

Media Audit in Action



Advocates who believe that terminally ill patients should have the legal right to have medical aid-in-dying zeroed in on the media's widespread use of the term "physician-assisted suicide" to describe what we now know as *medical aid-in-dying*. The latter was the supposedly "neutral" term that reporters often used to report on the subject. Yet the media audit and analysis emphasized that the word "suicide" implies a choice to die because one is depressed but could otherwise have lived a long and physically healthy life. But how could it be suicide if a terminal illness was already killing you? Advocates could see that they needed to focus — both in their own communications and in working with reporters — on reframing the most fundamental terms of the debate.



Read more about the movement's progress at heartwiredforchange.com/messaging.



SOCIAL LISTENING AUDIT: How do more informed and engaged audience members respond to news about your issue? Which messages penetrate the audience's psyche and which are dismissed? What life experiences and values do people bring to bear in understanding the issue? Social listening answers these questions by analyzing online comments on news articles and/or social media as a barometer of public opinion.

NARRATIVE ANALYSIS AND CONSTRUCTION: Analyzing, constructing and testing story narratives is critical to many of today's communications efforts. By analyzing existing stories, you can create a detailed picture of storytelling frames, mapping out key elements such as context, presumed audience, primary characters (e.g., narrator, protagonist, antagonist), secondary characters, narrative components, sequencing structures (how stories begin, build, pivot and end), and key words, images, ideas and emotions that are invoked or evoked.

PUBLIC OPINION RESEARCH REVIEW: In social change research, many funders require the development of metrics to measure core attitudes about your topic of interest. These metrics can be used to measure the degree to which those attitudes change as a result of being exposed to messaging — either during a survey or over the course of a communications campaign. A public opinion research review enables you to examine research that has previously been conducted on your topic to see whether existing attitudinal measures can serve as your core change measure or whether you need to develop new survey questions for that purpose.

BASELINE SURVEY: Baseline surveys take the temperature on an issue to see where people stand at the beginning of a research project. Based on these findings, you can estimate the size and scope of the communications effort required to achieve success. Analysis of the subgroup results also enables you to determine which populations (e.g., women with college degrees) will be most fruitful to include in your initial Mindset research.



EXPLORE AUDIENCE MINDSET

We once heard a senior staff person at a major environmental organization say, “We’re doing a great job talking about climate change, but no one is listening!” It’s an interesting perspective. It suggests that it is the audience’s fault for not listening. We believe that it’s our responsibility as change-makers to understand how to talk about an issue in a way that will motivate our audiences to not only listen, but to care and take action. If we put the onus on our audience to pay attention and care about our issue, then we relinquish an opportunity to change hearts and minds.

Mindset research provides a window into the life experiences, identities, beliefs and values of the people you are trying to reach. It reveals the most powerful points of connection: those that begin with what is fundamentally true for your audience, rather than the worldview that you — the already converted — hold. By using messages that fit into their already deeply-held values, rather than trying to change their core values, we can draw on emotional power that helps change hearts and minds. Simply put, it means that our audiences come to the change themselves rather than advocates having to foist it upon them.

The goal for the Mindset phase of the research process is to understand: *What do your audiences think and feel about your issue, why do they think that way, and what changes in their beliefs and attitudes are required for your desired change to occur?*

“DEEP LISTENING” RESEARCH

To that end, the Mindset phase relies primarily on qualitative research methods such as in-depth interviews, dyads or focus groups to provide a deep understanding of public attitudes and attitude formation in a way that is not possible with quantitative research, like surveys. These methods give you an opportunity to



We believe that it's our responsibility as change-makers to understand how to talk about an issue in a way that will motivate our audiences to not only listen, but to care and take action. If we put the onus on our audience to pay attention and care about our issue, then we relinquish an opportunity to change hearts and minds.

probe people's attitudes on a wide range of issues and to explore the sometimes complicated connections that people make between seemingly unconnected issues. You can learn directly from people, in their own words, the attitudes and concerns that are most important to them when thinking about issues key to the success or failure of your communication efforts.

In addition, qualitative research allows you to test ways of connecting the dots for people on complex issues (e.g., climate change) by providing clear and reasoned explanations about how those processes work. When it comes to complex issues, we have found that in the absence of understandable causal stories, people frequently take various facts they have at their disposal and weave their own (sometimes erroneous) narratives about the causal connections.

The Mindset phase also provides an entry point for employing a powerful deep listening approach. Developed in partnership with Dr. Phyllis Watts, this deep listening approach has been proven to engage key audiences and in many cases facilitate profound attitudinal change. Rooted in a real-world understanding of the latest social and applied behavioral science and neuroaffective research, the deep listening approach examines how human brains process emotions, reason and primal, or gut reactions, and how these processes influence people's decision-making. It relies primarily on qualitative data but can be incorporated into quantitative methods, as well.

RESEARCH GOALS

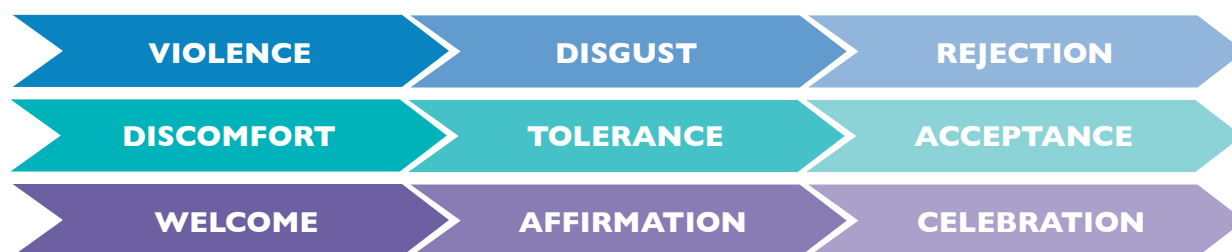
To unpack and map your audiences' existing emotional and psychological Mindset, research goals include:

- ✓ Exploring the interaction between your issue and their emotions, values, cognitive reasoning and moral judgments;
- ✓ Revealing how their individual and collective identities enable or undermine support for your issue;
- ✓ Determining where they experience internal conflict about the issue and how that conflict can be leveraged as an opportunity for change;
- ✓ Showing how they connect the dots and create meaning out of patterns they see and hear (or think they do);
- ✓ Discovering what narratives they bring to their understanding of your issue, and how those narratives impact support;
- ✓ Understanding how their lived experiences (or perceptions of those experiences) shape their emotional reactions;
- ✓ Exploring initial messaging and messenger approaches for later refinement in the Persuasion phase; and
- ✓ Analyzing the dynamics of the back-and-forth public debate.



CONTINUUM OF SUPPORT FOR LGBT PEOPLE

Using research to uncover adjacent possibilities



REVISITING INITIAL CHANGE HYPOTHESES

While your hypotheses are refined throughout the heartwired research process, the completion of the Mindset phase is a particularly important point at which to revisit and refine your initial Change hypotheses.

Research insights from the Mindset phase enable you to develop new hypotheses about your audiences and what level of change is possible within the scope of your effort. You may also need to refine your target audiences based on what you have learned to date. In some cases, you may want to develop a continuum of support for your issue area. Related to the adjacent possible concept discussed earlier, this continuum uses Mindset research to more specifically identify the steps or phases of change you seek.

In our LGBT work, for example, the Mindset research revealed that many people within our target audiences were psychologically unable to go from outright *rejection* of LGBT people to *affirmation*. It was too big a leap. Yet if we could help them move through the interim steps of *discomfort* and *tolerance*, we could bring our target audiences along the path in the positive direction.

The Mindset phase can also help you determine how to build momentum for the change you seek. Use the insights from this phase to determine where you are now in the diffusion of innovations theory described earlier and where to focus your energy next. For example:

- Do you already have early adopters whom you need to engage and activate as message ambassadors?
- If you have already engaged the early adopters, is it time to focus on building an early majority? Who are they?

EXAMPLE RESEARCH METHODOLOGIES

To understand the mindset of your audiences, we recommend using a range of deep listening qualitative methodologies such as:

IN-DEPTH INTERVIEWS: Unlike group-based research in which participants can choose to disengage during challenging moments by simply being quiet while others speak, one-on-one in-depth interviews (IDIs) allow researchers to probe more deeply into an individual participant's attitudes, beliefs and feelings. IDIs are also a useful tool to conduct research among elite respondents (e.g., major donors, policy experts or organizational leaders).

DEEP LISTENING FOCUS GROUPS: These exploratory focus groups help reveal people's values, emotions, identities and reasoning patterns as they engage on your issue in an interactive setting. While initial message testing is sometimes warranted for these sessions, the primary goal during the Mindset phase is to elicit rich, back-and-forth discussions among participants.



DYADS, TRIADS AND QUADS: These small group sessions help researchers understand how friends or family members talk with each other about complex issues. This type of research provides an opportunity to observe and probe people who have differing opinions and develop an understanding of influence patterns, the subtle ways in which one person is influenced to shift their attitudes by being exposed to someone else's attitudes. Unlike focus groups, where participants typically do not know each other, small groups are often conducted with pairs of people (dyads) who know each other well — such as a husband and wife, or mother and daughter — or small groups of three or four friends, relatives or coworkers (triads or quads).

ONLINE FOCUS GROUPS: While in-person focus groups require participants to live near where the groups take place, online focus groups (also known as online bulletin boards or “qual boards”) allow participants to be recruited from a larger geography and interact within a virtual environment. Online focus groups can be structured in a variety of ways. For example, they can parallel in-person focus groups and take place over a short time period (e.g., two hours). Or they can be conducted over multiple days, with participants logging in daily to answer questions and react to messages and stories. This multi-day approach enables researchers to iteratively test materials, incorporate feedback and revise approaches as they go. The online format allows for testing a variety of content, such as images, text, audio or video. The format also provides opportunities for participants to share content of their own, such as articles they have read or videos they shoot of themselves and their communities. Moderators can choose to communicate privately with participants (thereby reducing social desirability bias) or enable participants to post their comments publicly and interact more fully with one another.

ONLINE DIARIES: While focus groups and surveys allow us to capture voter sentiments at a particular moment in time, we know that in reality — especially on emotionally charged topics — people are often interacting in the debate around them in a dynamic way over a period of time. Online diaries allow participants to share their thoughts and experiences over a three- to four-week period (or even longer) as they take in different perspectives and information. Participants log in on a regular basis each week to answer questions and react to message content, which can be images, text-based, audio or video. Diary participants can share

comments privately with the moderator, with the group or a hybrid approach.

SOCIAL INFLUENCER FOCUS GROUPS: Unlike focus groups with more general audiences, these focus groups are conducted with high-information audiences such as engaged voters or community leaders. These people read the newspaper regularly, read or write blogs or letters to the editor and are otherwise very engaged with their community — and as a result, they are often a tipping point for shaping public opinion.

LANGUAGE ANALYSIS AND COGNITIVE LINGUISTICS: Research suggests that people rarely know completely why they believe what they do, nor can they accurately self-report those beliefs thoroughly and objectively. Much of what they feel and believe may exist under the surface so they are unable to articulate it. This dynamic is especially true for emotionally complex issues. A cognitive linguistic approach helps identify underlying patterns of reasoning and reveals some of the ways in which participants' existing frames, categories, metaphors and mental rules of thumb drive how they react and reason as they do.

Mindset research provides a window into the life experiences, identities, beliefs and values of the people you are trying to reach. It reveals the most powerful points of connection: those that begin with what is fundamentally true for your audience, rather than the worldview that you — the already converted — hold.





PERSUASION

TEST PERSUASION STRATEGIES

The first three phases of the research process help you define the change you are seeking, the underlying context in which you are seeking it, and the mindset of those who must be persuaded in order to achieve success. When you're ready to test your persuasion strategies, the core research question is: *How do you effectively persuade your audiences to support the change you are seeking?* To answer this question, you'll need to consider:

- What kinds of messages and messengers will most effectively resonate and connect with your key audiences in ways that reflect their own values and lived experiences?
- How are you able to facilitate identification with your messengers?

- What conscious or unconscious associations need to be disrupted? What do they need to be replaced with?
- How do you develop alternative stories or narratives that still align with audience identities and values that can be an alternative to the problem story?
- For communication efforts in a contested environment, how are opposition messages and messengers triggering resistance?

RESEARCH GOALS

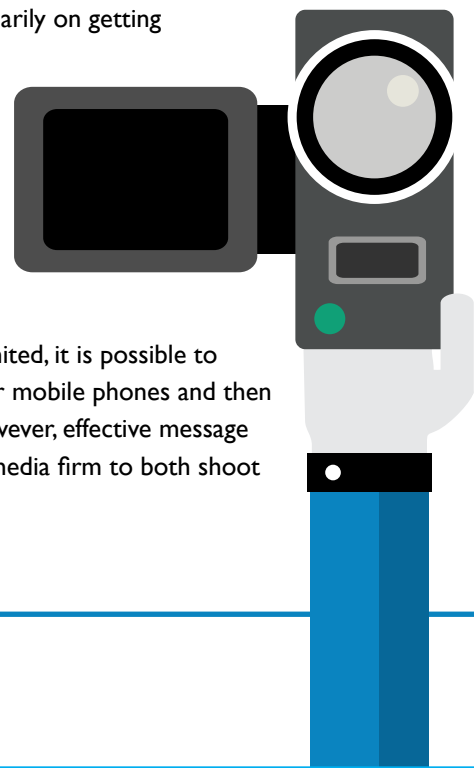
Effective messages must be values-based and emotionally attuned to your target audience. As we learned in *Change from the Inside Out*, by using messages that fit with your audience's existing values rather than trying to change their core values, you can draw on the emotional power that helps a person come to the change themselves.

In addition, persuasive communications are inextricably tied with the messengers delivering them. The same message from one kind of messenger will fall flat, while

MESSAGE-TESTING VIDEOS

Traditional qualitative and quantitative research has often relied primarily on getting participant reactions to written materials. We recommend showing participants test videos to assess messages in a way that combines content, context *and messengers* all in one platform. This research approach also reflects an increased use of video to communicate and persuade. Importantly, this message-testing medium could be used on an ongoing basis to craft and test new messages as issues evolve on the ground.

For exploratory research or if your research budget is extremely limited, it is possible to develop videos for testing by filming using personal video cameras or mobile phones and then hiring an editor to do the actual editing. In later research phases, however, effective message development and testing requires partnering with a highly qualified media firm to both shoot and edit the test videos.



it can be a home run from a messenger with the right characteristics, credentials and emotional tone.

Therefore, the Persuasion phase focuses on the following research goals:

- ✓ Elevate shared values that allow you to work from within your audience's existing mindset, not against it;
- ✓ Tap into people's core psychological need to see themselves as good people who do right by others. This need can be a powerful motivator to shift attitudes and change behavior;
- ✓ Use messengers with whom your audience can identify, which can sometimes be "unexpected" (e.g., generals talking about climate change as a threat to national security);
- ✓ Understand ways in which opposition messaging can trigger negative emotional reactions, and then develop effective *emotional* rebuttals (not a tit-for-tat response);
- ✓ Ensure your communications are effective in a real-world environment by using a feedback loop of testing, measuring (e.g., via field tests) and refining; and
- ✓ Do the necessary internal work to ensure your resulting communications are adopted and implemented by allies.

EXAMPLE RESEARCH METHODOLOGIES

Creating effective communications in the Persuasion phase relies on a variety of methodologies. A combination of some of the following qualitative and quantitative methods often leads to the best results:

MESSAGE-TESTING FOCUS GROUPS: While focus groups in the Mindset phase are often exploratory in nature and are designed to understand the emotions, values and identities of your audiences, message-testing focus groups build on pre-existing knowledge to develop, test and refine messages. They can also be used to test reactions to opposition messages and the rebuttals that would be employed in an engaged public debate.



To learn even more about the research methodologies you can use to accelerate social change, visit heartwiredforchange.com/toolbox

ONLINE SURVEYS: Online surveys are also useful as a way to explore attitudes on controversial issues that might be affected by social desirability bias when a person is surveyed by a live interviewer. In addition, online surveys also provide an excellent platform for testing messages, including lengthy messages or those that combine message and messenger in an audio or video format. Online surveys allow us to gather important qualitative data through open-ended verbatim responses.

TELEPHONE SURVEYS: Despite the rise of online surveys, telephone surveys remain one of the best data collection methods available because they reach a representative sample of people within a given geography. Telephone surveys are especially critical for election-related research, such as for ballot initiatives, because they target respondents using voter lists that include history of voting in past elections and other information that improves the validity of the results. A larger discussion about the advantages and disadvantages of telephone surveys versus online surveys can be found in our online Toolbox.



CONCLUSION

ENVISION YOUR ADJACENT POSSIBILITIES

How Do Your Adjacent Possibilities Lay the Groundwork for Bigger Change?

We hope this guide has helped you to think differently about human behavior and how people make decisions on emotionally complex issues. When we present on the heartwired approach, people often ask us what it takes to get started on developing a plan for using strategic research to create big, audacious change on their issue.

To that end, we want to leave you with a set of strategic questions that you might use to guide your thinking and immediate next steps. Before you begin any opinion research, start to develop your own Change hypotheses by exploring your adjacent possibilities and how they lay the groundwork for bigger change. Start with these four sets of questions regarding the change you want to make in the world:

1. Define Your Change.

- What is the change you want to see regarding your issue?

2. Chart Your Near-Term vs. Long-Term Change.

- What parts of that change seem possible to make in the near term? What might be some adjacent possibilities that exist now?
- What parts of that change seem likely to take more time or be longer-term goals?

3. Plot Your Near-Term Barriers and Opportunities.

- What do you see as the barriers to enacting this near-term change?
- What do you see as the opportunities or potential pathways that could help support enacting this near-term change?

4. Map Your Longer-Term Barriers and Adjacent Possibilities.

- What do you see as the barriers to enacting this longer-term change?
- What intermediate changes — or adjacent possibilities — would best lay the groundwork for the longer-term change you're ultimately striving to achieve?



APPLYING THE DIFFUSION OF INNOVATIONS THEORY TO SOCIAL CHANGE

Look at the diffusion of innovations theory. Realize that *you* are an innovator — that's why you are reading this guide and working to create social change.

As a change-maker, before you begin any research, you should think about where your movement is now and how to most rapidly create change.

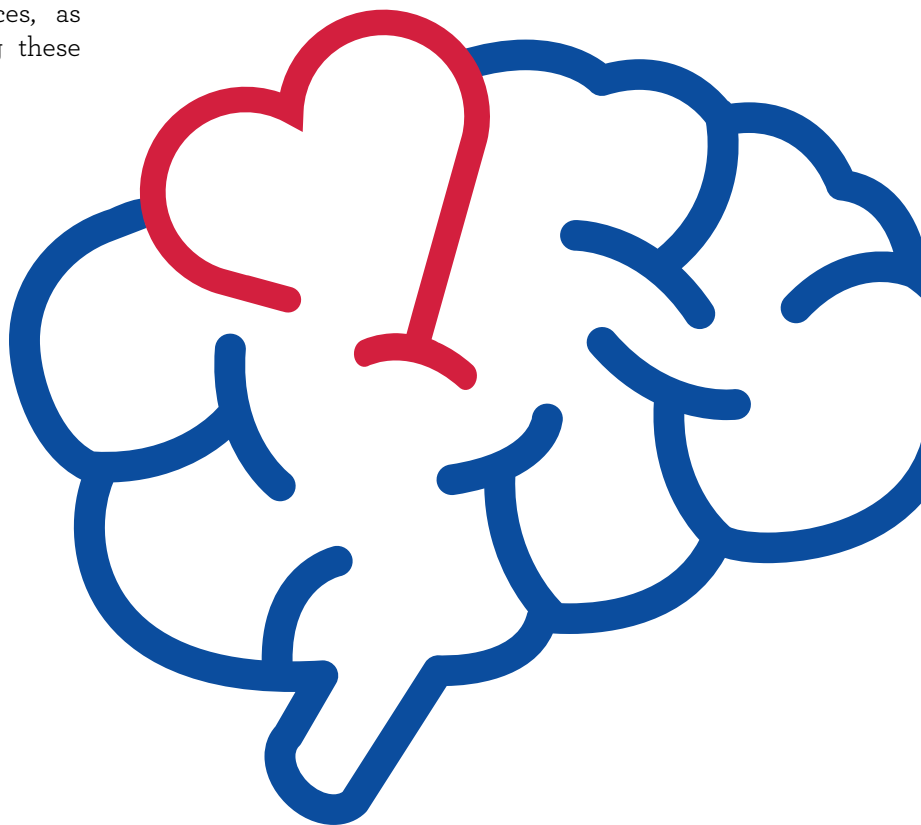
- **Who is your real target audience at this time to build the support you need — or activate an existing base — to enact the change you seek?**
- **Do you still need to create a larger pool of innovators?**
- **Are you building a set of early adopters who can then be social influencers to build an early majority?**
- **Are you already into the early majority phase and need to keep expanding that group to get firmly into majority support for your position?**

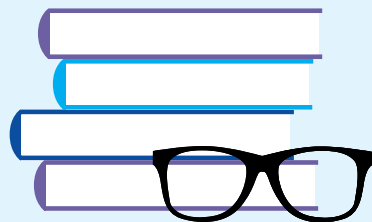
Your adjacent possibilities for change likely involve creating change within certain key audiences, as opposed to the general public. So answering these

questions can help you determine *who* you should be conducting research among in order to develop and disseminate your strongest messaging approach. Prioritizing your audiences and research questions also maximizes the impact of your research budget.

Having answers — even partial ones — to these key questions will help to shape your initial Change hypotheses and guide your research in the most effective direction. So what are you waiting for?

We wish you luck, and thank you for the important work you do to make our world a safer, more just and compassionate place.





An Iconoclast's **READING LIST**

Over more than a decade of collaboration, Amy Simon and Robert Pérez have been partners in their passionate pursuit of new ideas. Advances in the neurological and social sciences have catalyzed a paradigm shift in our understanding of how identity, values, lived experiences, beliefs and emotions combine and collide to influence decision-making. Here are just some of the books that have shaped our approach and inspired new thinking about attitude and behavior change. See the Heartwired website heartwiredforchange.com/geekreads for more recommendations.

Blindspot: Hidden Biases of Good People, by Mahzarin R. Banaji and Anthony G. Greenwald

The Belief Instinct: The Psychology of Souls, Destiny, and the Meaning of Life, by Jesse Bering

Iconoclast: A Neuroscientist Reveals How to Think Differently, by Gregory Berns

Wired for Story: The Writer's Guide to Using Brain Science to Hook Readers from the Very First Sentence, by Lisa Cron

Riveted: The Science of Why Jokes Make Us Laugh, Movies Make Us Cry, and Religion Makes Us Feel One with the Universe, by Jim Davies

I Is An Other: The Secret Life of Metaphor and How It Shapes the Way We See the World, by James Geary

Blink: The Power of Thinking Without Thinking, by Malcolm Gladwell

The Tipping Point: How Little Things Can Make a Big Difference, by Malcolm Gladwell

The Storytelling Animal: How Stories Make Us Human, by Jonathan Gottschall

Cognitive Linguistics: An Introduction, by Vyvyan Evans and Melanie Green

The Righteous Mind: Why Good People are Divided by Politics and Religion, by Jonathan Haidt

Switch: How to Change Things When Change is Hard, by Chip Heath and Dan Heath

Made to Stick: Why Some Ideas Survive and Others Die, by Chip Heath and Dan Heath

Strangers in Their Own Land: Anger and Mourning on the American Right, A Journey to the Heart of Our Political Divide, by Arlie Russell Hochschild

Where Good Ideas Come From: The Natural History of Innovation, by Steven Johnson

Thinking, Fast and Slow, by Daniel Kahneman

Subliminal: How Your Unconscious Mind Rules Your Behavior, by Leonard Mlodinow

Winning the Story Wars: Why Those Who Tell – and Live – the Best Stories Will Rule the Future, by Jonah Sachs

The Believing Brain: From Ghosts and Gods to Politics and Conspiracies – How We Construct Beliefs and Reinforce Them as Truths, by Michael Shermer

The Political Brain: The Role of Emotion in Deciding the Fate of the Nation, by Drew Westen



RESOURCES



GET WIRED FOR HEARTWIRED

Geeks Go Here for More Resources & Examples: heartwiredforchange.com

The two of us are part of a book club (called the Brain Book Club) in which we discuss books about psychology, moral reasoning, brain science, storytelling and more.

After reading and discussing a book, our brains are often racing with questions and a desire to further explore the practical application of the insights and innovations shared. Like true geeks, we're always excited to find a companion website to our favorite brain books.

We have created heartwiredforchange.com for those who want to continue exploring the case studies, research tools and themes featured in this strategy guide.

At heartwiredforchange.com, you will find:

HEARTWIRED MESSAGES: You can watch ads featured in our case studies and see other message examples developed using a heartwired approach to research and messaging.

GEEK READS & BRAIN BOOKS: We spotlight an expanded Iconoclast's Reading List to inspire your own thinking on how to expand your adjacent possibilities.

RESEARCH TOOLBOX: To further explore different approaches to research for social change, we have developed a toolbox that examines and explains the cutting-edge research methodologies available today.

After visiting heartwiredforchange.com, email us your thoughts and questions at info@heartwiredforchange.com. Share your own examples of how you are applying a heartwired approach to research and communications.



ACKNOWLEDGMENTS

OUR LIQUID NETWORKS

This strategy guide is made possible only because of the contributions and thinking of many — what Steven Johnson, author of *Where Good Ideas Come From* — calls “liquid networks.”

According to Johnson, innovative ideas don’t come from a “eureka” moment. Instead, the process is a “slow hunch” that evolves over years and the big breakthrough — when an idea takes real shape — often needs a “liquid network” to finally crystalize. “Every idea is fundamentally a network of ideas,” Johnson says. “When you create an environment that allows the kinds of serendipitous connections to form, innovative ideas are more likely to happen.” Liquid networks require a diversity of experiences and expertise, and it’s the active interchange of insights and ideas that so often finally yields the big breakthrough.

We believe in the power of liquid networks. So we want to genuinely thank the many colleagues who have formed our “liquid networks” and brainstormed, questioned, listened and challenged — and thereby contributed tremendously to the development of our thinking over the last three decades.

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David Binder
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Angela Glover Blackwell
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Charmaine Manansala
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Jill Marcellus
Anne Marks
Andy Marra
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Ted Martin



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Molly McGovern
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Erik Sahlin
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Ryan Schwartz
Rinku Sen
Rashid Shabazz
Larry Shannon
Tash Shatz
Anat Shenker-Osorio
Robert Sherman
Saul Shorr
Zach Silk
Daniel Silverman

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Scott Simpson
Alyssa Singer
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Anthony Smith
Bill Smith
Christal Smith
Chuck Smith
Mike Smith
Nadine Smith
Sean Smith
Mark Snyder
Andrew Solomon
Marc Solomon
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Anne Stanbeck
Grant Stancliff
Kate Stewart
Stephanie Ong Stillman
Terry Stone
Rev. Roland Stringfellow
Katie Stuckenschneider
Anne Stuhldreher
Kasey Suffredini
Justin Tanis
Michael Temple
Jenifer Thom
Roey Thorpe
Dean Tipps
Beth Toner
Michael Toumayan
Rev. John Vaughn
Donna Victoria
Leslie Walker
Pete Walton
Amber Washington
Phyllis Watts
Alexis Weiss
Kristina Wertz
Drew Westen
Richard Wiles
JoDee Winterhof
Lisa Witter
Evan Wolfson
Richard Woo
Jace Woodrum
Michael Woodward
Alyssa Wulf
Rick Zbur
Thalia Zepatos

Alliance for Boys and Men of Color
Americans for Workplace Opportunity
API Equality
ACLU Fund of Michigan
ACLU of Northern California
ACLU LGBT & AIDS Project
Analyst Institute
Arcus Foundation
Asian & Pacific Islander Wellness Center
Auburn Theological Seminary
Basic Rights Oregon
Berkeley Media Studies Group
Blackbird
Black Lives Matter
Bolder Giving
Buck Institute for Education
BuildingBlox Consulting
Burness Communications
California Faith for Equality
Campaign for Black Male Achievement
CD2
Center for American Progress
Center for Media Justice
Center for Youth Wellness
CenterLink
Change Consulting
Cities United
Civil Marriage Collaborative
Clarity Campaign Labs
Climate Central
Coastal Enterprises, Inc.

COLAGE
Compassion & Choices
Communities for Just Schools Fund
Conway Strategic
Courage Campaign
D5 Coalition
David and Lucile Packard Foundation
DignityUSA
East Baltimore Development, Inc.
East Oakland Building Healthy
Communities
Edge Research
Empire State Pride Agenda
EMS Corps
Energy for Humanity
Energy for the Common Good
Equality Federation Institute
Equal Rights Washington
Equality Arizona
Equality California
Equality Florida
Equality North Carolina
Equality Ohio
Equality Pennsylvania
Equality Maine
Equality Texas
Equality Utah
Equality Virginia
Evelyn and Walter Haas, Jr. Fund
Everytown for Gun Safety
Face Value
Fair Wisconsin
Family Equality Council
Fenton Communications
First Place for Youth
Ford Foundation
Freedom for All Americans
Freedom to Marry
Funders Collaborative on Youth
Organizing
Funders for LGBTQ Issues
Gay and Lesbian Advocates and
Defenders
Gay & Lesbian Elder Housing
Gay & Lesbian Victory Fund
Gay City Health Project
Gender and Sexualities Alliance Network
Gender Spectrum
Georgia Equality
Gill Action
Gill Foundation
GLAAD
Global Action for Trans* Equality
Global Philanthropy Project
The Goodman Center
Hagedorn Foundation
Horizons Foundation
Human Rights Campaign Foundation
Immigration Equality
Indiana Youth Group
Insight Center for Community Economic
Development
Island Institute
Jordan/Rustin Coalition
Keshet
Kevin J. Mossier Foundation
Lambda Legal
Latino Equality Alliance
Lawyers Committee for Civil Rights of
the Bay Area
LightBox Collaborative
Los Angeles Gay & Lesbian Center
Lyon-Martin Health Services
LYRIC
Maine Coast Fishermen's Association
Maine Equal Justice Partners
Maine House Democratic Campaign
Committee
Maine People's Alliance
Maine People's Resource Center
Maine Philanthropy Center

Maine Senate Democratic Campaign
Committee
Maine Votes
Mainers United for Marriage
Massachusetts Transgender Political
Coalition
MassEquality
More Light Presbyterians
Movement Advancement Project
Moxie Media
Muslim Advocates
NARAL Pro-Choice America Foundation
National Black Justice Coalition
National Center for Lesbian Rights
National Center for Transgender Equality
National Employment Law Project
National LGBTQ Task Force
Natural Resources Council of Maine
New York City Anti-Violence Project
New York LGBT Community Center
Open Society Foundations
One Colorado
Our Family Coalition
Pacific School of Religion
Palm Center
Parallax Group
PFLAG
PFund
Planned Parenthood Affiliates of
California
Planned Parenthood of Wisconsin
Planned Parenthood Federation of
America
PolicyLink
Pride Foundation
Progressive Christians Uniting
PROMO
Q Center
Race Forward
Robert Wood Johnson Foundation
SAGE
San Francisco LGBT Community Center
Save the Redwoods League
SoulForce
Storefront Political Media
The California Endowment
The Center Orange County
The Funding Exchange
The Nature Conservancy in Maine
The Russell Family Foundation
The UMOJA Project
Tides Foundation
Tipping Point Community
Trans Ohio
Transgender Law Center
Trevor Project
Unite HERE Local 2
Utah Pride Center
Vote for Equality
Washington State Trial Lawyers
Association
Washington State Labor Council
Washington United for Marriage
Wellspring Advisors
William Way LGBT Community Center
Williams Institute

Over the last year, the special people in our lives — a spouse and a partner, children, other family members and dear friends — have patiently listened as we bent their ears about Heartwired. Occasionally, we missed out on quality time in order to squeeze in another writing session. Thank you for your love, patience and support.

Robert Francoeur
Ruth Ann Gonzales
Leila, Maya and Casey
and many more (you know who you are!)



ABOUT

ROBERT PÉREZ & AMY SIMON



Robert leads an immersive research field trip on behalf of a land conservation client.

Robert Pérez

Founder + Chief Exploration Officer, Wonder: Strategies for Good

Convinced that stories have the power to change the world, Robert Pérez develops branding and messaging strategies that utilize narrative to inspire action, strengthen support for a cause and transform people and organizations. Robert is the founder and chief exploration officer at Wonder: Strategies for Good, an audience research and communications network that works exclusively for social causes.

The son of migrant farmworkers, Robert has dedicated the last 20 years of his life to working with people and organizations to achieve change within their walls and out in the world.

Robert has developed a unique approach to messaging and branding that utilizes the science of storytelling to shape attitudes, influence behavior and strengthen support for organizations and causes. He's applied his approach to social-change communications to make progress on the most pressing issues of the day — especially issues where bias because of race, ethnicity, sexual orientation or gender identity creates roadblocks to progressive social change.

Together with Amy Simon, Robert has co-led research for the past seven years on how to talk to conflicted Christians about the place of lesbian, gay, bisexual and transgender people (LGBT) in church and society. In 2011, using insights from that research, he developed a successful public education campaign within the Presbyterian Church USA that helped faith activists to overturn a 30-year ban that had prevented LGBT people from being ordained as clergy.

Working with the Lawyers Committee for Civil Rights and the National Employment Law Project, he led a messaging effort on how to talk about hiring people with arrest and conviction records. His narrative strategy has proven effective at lessening fear, eliciting empathy and appealing to the shared values of redemption and the value of a job.

When he's not developing storytelling strategies, Robert can be found out on an urban hike in San Francisco with his husband, Robert Francoeur (yep, two Roberts!).

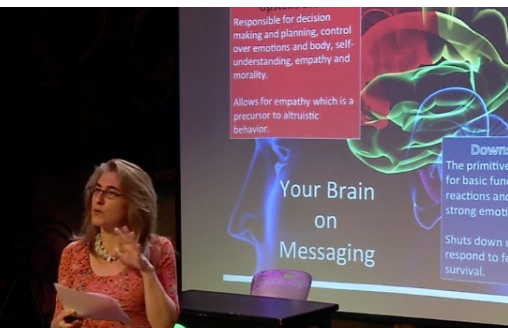
Twenty-Five Years of Friendship and Collaboration

Amy Simon and Robert Pérez first met in 1992 when Robert was working on the congressional campaign of Anita Perez Ferguson and Amy was her persuasion direct mail consultant. They embarked on a close, collaborative partnership that continues today.

Working with Auburn Theological Seminary in 2010, they conducted groundbreaking messaging research that helped fuel a substantial shift in hearts and minds on both the ordination of LGBT clergy in Christian churches and marriage

for same-sex couples. As part of this cutting-edge work, they were principal co-authors of "My Mind Was Changed: A New Way to Talk to Conflicted Christians about Lesbian, Gay, Bisexual and Transgender People in Church and Society" — a practical guide to communicating effectively and persuasively with mainline Christians about LGBT people. More recently, they have led research on behalf of Human Rights Campaign Foundation on how to talk to mainline Christians about the inclusion of transgender people in churches and faith communities.





Amy presents on how strategic research was used to win the freedom to marry for same-sex couples.

Amy Simon

Founding Partner, Goodwin Simon Strategic Research

A founding partner at Goodwin Simon Strategic Research, a national public opinion research firm, Amy Simon brings three decades of political experience to her work as a pollster and communications strategist. She conducts public opinion research on a variety of public policy issues.

Amy has a unique background among the nation's top progressive pollsters. She was a community and field organizer, campaign manager, direct mail fundraising and persuasion consultant, campaign trainer and political director before becoming a pollster — and she brings that diverse political understanding to all of her message development and message delivery research.

Amy has a special expertise in conducting innovative qualitative and quantitative research on socially controversial and emotionally complex issues, and particularly in developing effective messaging and a winning record on ballot measure campaigns.

Amy is one of the leading architects of the freedom-to-marry messaging that helped propel Maine and Washington state voters to support allowing marriage for same-sex couples in the November 2012 elections. She has also helped craft winning strategies on abortion, marijuana, medical aid-in-dying, climate change, insurance reform and medical malpractice as well as other issues.

Born in New York and raised in Boston, Amy attended the University of Michigan, then spent several years working on campaigns across the nation. She lived and worked for a decade inside the Washington, D.C. Beltway, before heading west to San Francisco's Bay Area, where she now happily resides with her wonderful children.

In 2015, Amy and Robert partnered with their frequent collaborator, Dr. Phyllis Watts, to lead research to support Compassion & Choices in their efforts to make medical aid-in-dying a legal option for terminally ill Californians and their families. The research resulted in the development of powerful messaging and storytelling strategies that helped advocates secure a difficult legislative win. On October 5, 2015, Gov. Jerry Brown signed legislation making California the largest state in the nation to allow the option for medical aid-in-dying. Since then, Compassion & Choices has integrated this strategic messaging approach in successful efforts to make medical aid-in-dying a legal option in Colorado and Washington, DC.

In partnership with Transgender Law Center and Basic Rights Oregon, Robert, Amy, and Phyllis co-lead a multi-year research and strategic messaging project to help positively shape people's understanding of what it means to be transgender and to strengthen support for transgender-inclusive healthcare coverage. As part of this cutting-edge research and communications work, they developed "Healthy People. Healthy Communities. A Toolkit for Effective Conversations about Transgender Healthcare Access," which has been made available to advocates across the nation working on a range of transgender-related policy and education campaigns.



