**Relationship Building in MNsure Outreach**

**Session Objectives**

* Participants understand relationship building as a fundamental part of outreach work
* Participants understand self-interest as what motivates individuals to take action
* Participants practice and understand the mechanics of “Making-the-Ask”, including identifying areas of shared self-interest
* Participants understand basic tools to maintain effective relationships

**Training Materials**

* Visual Aid (PowerPoint, projector, and screen)
* Effective Partner Examples handout
* Relationship Map handout
* Key Concepts handout
* Blank paper (1-2 sheets per person)
* Pens (1 per person)
* Flip chart, easel, and markers
* Tape
* Chairs for demonstration (2)

**Room Setup**

The room setup is flexible and will largely depend on the number of participants. Because this module includes some one-on-one conversation, space for participants to stand up and move around is ideal but not required.

**Topics Covered**

* Why Relationships Matter
* Identifying Opportunities
* Establishing and Maintaining Relationships

**Facilitator Notes**

This is a discussion and exercise-heavy session. While directions for facilitating each discussion and exercise can be found under “Section Notes”, please note that some cues do exist (in bracketed italics) within the Facilitator Scripts themselves. When appropriate, the facilitator should share examples and solicit stories from participants. It’s important, however, to understand the dynamic of the room; that is, if the group is a mix of metro and Greater MN assisters, ensure that stories are being shared are from all areas of the state.

**WELCOME & INTRODUCTION**

**(5 minutes)**

**Section Notes**

*Introduce yourself and the agenda for the day. Share some information about who you are (e.g., where you live, what your favorite part of your job is, a fun fact, etc.). Next, preview the session agenda, the location of amenities, and encourage people to participate fully.*

**Facilitator Script**

* Hello everyone, and thank you for coming! My name is *\_\_\_\_\_\_\_\_\_\_* and I am the *[title]* at *[organization].*
* Welcome to our session on Relationship Building in MNsure Outreach! Today we are going to learn how to build relationships that will make our work more effective and efficient!
* In the next two hours, we will cover:
  + Why relationships matter
  + How to identify potential relationships
  + How to effectively establish an relationship
  + How to maintain a good relationship
* There are a few things I’d like to point out before we get started:
  + Bathrooms are located \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + If you’d like to grab some refreshments, they are located \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* I also want to encourage everyone to participate as much as they can today. There is a lot of wisdom in this room, so the more people participate, the more we all will learn!

**ICEBREAKER & GROUP INTRODUCTIONS**

**(10 minutes)**

**Section Notes**

*Participants will pair up and spend 2 minutes getting to know one another, and will then introduce their partner to the rest of the group. Pairs should remain consistent throughout the session. If there is an odd number of people in the room, you can designate one group of three, or you can choose to pair yourself with a participant.*

**Facilitator Script**

* Since the purpose of this session is to better understand the ins and outs of building new relationships, we will start today by getting to know someone new!
* First, I’d like you to find someone near you that you don’t know yet, or perhaps someone you just don’t know very well.
* I’m going to give you 2 minutes to get to know your partner a bit, and afterward you’ll each get 30 seconds to introduce your partner to the group. Remember to listen closely to what they tell you!
* Some things you might want to get to know about your partner include:
  + Their name and where they live
  + Their title and/or organization
  + Something they’re excited to learn about today
  + Their favorite part of their job and/or a fun fact about them
* The work we all do—to find and enroll the uninsured in Minnesota—is hard! We all have barriers we face on a daily basis.
* By getting to know each other and building a strong network of partnerships, we can overcome those barriers and accomplish more than we ever could on our own.

**WHY RELATIONSHIPS MATTER**

**(10 minutes)**

**Section Notes**

*Explores the barriers that participants face in their daily outreach work. The goal is to get the group to come to a consensus that, while we face regular struggles in doing this work, we can overcome many of these barriers through effective relationship building.*

*When prompted, record participant answers on pages from the flip chart for examples of barriers faced. Try to get participants to be as specific as possible when sharing. For example, if they name “money” as a barrier, ask them what they currently need that more money could get them. When finished recording answers on a flip chart page, tape the responses to the wall behind you.*

**Facilitator Script**

* Who here has ever struggled with outreach? What are some of the things that have gotten in your way of success? *[Record answers on flip chart page and tape to wall; ask participants to be as specific as possible.]*
  + *[If participants have very recently been through “Outreach as a MNsure Partner” or “Effective Outreach Tactics”, modify accordingly to acknowledge that this information is review; if you still have flip chart pages showing barriers discussed in those modules, simply reference them.]*
* Every organization faces its own struggles in doing outreach. This is not easy work, and the barriers we experience are very real!
* The important thing to remember is that these barriers are almost never insurmountable.
* The most effective way that we can overcome even some of the biggest barriers to our outreach work is by building a network of **external partnerships**— relationships with organizations and people outside of our own organizations that can help us take action toward meeting our goals.
  + Why do you think that is the case?
  + Who can share a specific example of a time when building a partnership helped you access some of the resources you needed, or overcome some other barrier?
* These are all great examples of how building partnerships can help us do this important, but sometimes difficult, work. Our relationships help us:
  + Extend our reach into the community
  + Access resources we don’t have
  + Spend our time playing to our strengths
  + Tap into other people’s skills, knowledge, and strengths
  + Expand the work we can do in a small amount of time
  + Offer help to new populations of people
* It’s clear that we now all understand *why* this is an important component of our work.
* Now let’s break down the process of *how* we go about building effective relationships!

**IDENTIFYING OPPORTUNITIES**

**(25 min)**

**Section Notes**

*This section introduces the Relationship Map, which is a tool participants can use to help them build a strategy for pursuing the most effective partnerships. In the Relationship Mapping exercise, participants will examine organizations in their own communities and begin to evaluate which ones have the strongest potential for partnerships. Participants may work with one another to complete this exercise.*

**Facilitator Script**

**The Nuts & Bolts of Relationship Mapping**

* Potential partnerships are all around us. They exist in every community, and they take many different shapes.
* The trouble is that **no one in this room likely has time to meet with every single organization that might be able to help us r**each the uninsured, so it’s important to think strategically about who we should reach out to and why.
* You can do this is by **listing all of the organizations** that you think might be able to help you and then **prioritizing them** based on the depth of the potential relationship.
* In your materials, you have a Relationship Map—it looks like a bullseye. Can everyone take theirs out?
* When prioritizing my relationship building work, I like to use this map as a tool to help me organize my thoughts.
* You’ll see that each ring of the bullseye has a word in it; these words represent the three different “categories” that most relationships fall into.
* The three categories are:
  + **Sustained Relationships:** these are the organizations with whom I share a lot of the same goals and vision. They’re organizations that I can see establishing long-term projects with, and working closely with on a regular basis.
    - *Example: a local broker agency with whom I want to establish weekly shared office hours and partner with on promotion.*
  + **Ongoing Relationships:** these are organizations that usually share similar goals and vision with me, but for whatever reason I think it’s unlikely that we would be able to partner on long-term goals or projects.
    - *Example: a local cafe that put up my flyers and business cards. They have open mic nights a few times a year that I’d like to table at.*
  + **Peripheral Relationships:** I use this category for those organizations that I want to be in touch with, but for whatever reason I really don’t see working directly with on even short-term projects.
    - *Example: another local assister organization is doing similar work to me; we don’t have much of an opportunity to do things together, but it would be nice to have someone to share best practices with every so often.*
* The **relationship map** is a tool we can use to help us approach our relationship building in a strategic way. It helps us determine whether my relationship with an organization is likely going to be a sustained one, an ongoing one, or a peripheral one.
  + This helps me be realistic about my expectations, and it helps me prioritize which organizations I should reach out to first.

**Relationship Mapping Exercise**

* We are going to take some time and examine some of our own potential relationships!
* In a few minutes I’m going to give you time to think through the people and organizations you have in your community and consider where they fit on your own map.
* Before we get to that, though, we need to start with a list of organizations.
* On a piece of paper, I’d like everyone to write down the names of **ten organizations** in their communities. These can be other assister organizations, advocacy organizations, chambers of commerce, small businesses, etc.
  + Try to limit the list to organizations that you think *might have the potential* to help you reach more uninsured people.
  + Don’t spend too much time fretting over whether an organization actually is a good prospect. If you aren’t positive that an organization can help you, that’s okay—put it down and you can figure it out during your mapping process.
  + *[Give participants 2-3 minutes to make their lists]*
* Now that we have our lists, it’s time to start mapping!
* To do this, you’re going to review your list and think about what the partnership potential is for each of the organizations you wrote down. Try to determine what category you think they fall into.
* Some questions to consider when completing your relationship map are:
  + Which organizations have access to people who are likely to be uninsured?
    - Are they in contact with people who are likely to be low-income or unemployed, new immigrants, or Young Invincibles?
    - If it’s a business, do they have part-time employees who likely aren’t offered health care insurance by the company?
    - Are there organizations like this that you already have relationships with, but that you think you could leverage more?
  + Which of these organizations could potentially help me overcome the most barriers (or the most important/difficult ones) that I face in my MNsure outreach?
    - Do they have access to people that I have trouble accessing?
    - Do they have a space I could use for enrollments in a community in which I don’t have an office?
  + With which organizations can I envision a sustained or ongoing partnership?
    - Does the organization likely share any of my goals?
    - Are they likely to already be doing outreach that we could work on together?
    - Can I see myself planning an event with them?
    - Do I want to be in regular, ongoing contact with them?
* You’ll have 7 minutes to complete your maps! Again, don’t worry about getting it perfect—just try you best. Go!
  + *[Give participants 7 minutes to work. Let them know when they have 3 minutes left, then 1 minute, then when it’s time to stop.]*

**Debriefing the Exercise**

* Now that you’ve completed your maps, I’d like you to pair up with the same partner you helped introduce at the start of the session. Walk each other through your maps and feel free to ask each other questions if you have them.
  + *[Give participants 5 minutes to share with their partners.]*
* *[Discuss:]*
  + Was anything surprising about this exercise?
  + Was anything difficult?
  + Who was surprised by the number of potential partnerships they actually have?
  + Did anyone discover new potential for a relationship you already have?
* It’s normal to feel overwhelmed when you first start to think about who you need to be in relationship with, or to feel like there are zero possibilities!
  + It’s sometimes helpful to loop another person into your list building, or even to connect with assisters from other organizations to hear about some of the things that have been working for them.
    - This can help you find possibilities that you didn’t see before, or better narrow down a too-long list.
  + Once you have your list put together, mapping it out will hopefully help you see the path forward a little more clearly, and will help you make strategic decisions about how best to spend your precious time.

**The Nuts & Bolts of “Making the Ask”**

**(5 minutes)**

**Section Notes**

*Help participants define what it means to mobilize someone and introduce the three steps of the “Making an Ask” conversation. The goal is to help participants understand what goes into making an effective ask of a potential partner in order to get them to take action with you.*

**Facilitator Script**

**Mobilizing People to Take Action**

* We’ve talked a lot about the barriers we face in this work and the ways we can identify good potential partners.
* Now we will discuss how to establish effective relationships with potential partners once we’ve identified them, which is the basis of how we **mobilize them**—or get them to take action with us.
* We do this within the context of what we call a **“Making the Ask” conversation**, which has three parts:
  + Identifying and exploring your shared self-interest with someone
  + Inviting that person into a partnership – this is what we call “the ask”
  + Establishing the terms of your partnership, including goals and expectations

**Exploring Self-Interest**

**(15 min)**

**Section Notes**

*This section will help participants explore the importance of understanding your shared self-interest before making an effective ask. When prompted, draw a stick figure on a piece of flip chart paper (or draw the figure ahead of time). On the page, record what the group shares as things one needs to know about the figure in order to make a good ask. When finished recording answers, write the words “SELF-INTEREST” in large letters on the same page.*

**Facilitator Script**

* The first thing we have to do in a “Making the Ask” conversation is to get to know the other party.
* Why is that?
* Let’s imagine you just got off the train and realized that you left your wallet on the seat. The wallet is gone. You had all of the money for your rent in that wallet, having just gone to the bank. Rent is due tomorrow. Whom do you call to spot you the money by tomorrow?
  + *[Participants will likely say family and close friends.]*
* Why would you start with your family and friends?
  + *[These are people we have strong relationships with, who support us because they care about us, independent of the cause.]*
  + *[Even though lending you lots of money isn’t likely the best thing for them to do for themselves, they are still willing to help.]*
* So, why is this relevant? Because the truth is, not everyone in the world is willing to help us out simply because they love and care about us.
  + But a lot of us still act as if they are!
  + This results in us asking for help and getting a *lot* of people telling us “NO”.
* Who here has ever tried to solicit help (e.g., a large money donation or a significant portion of time) from someone you don’t know anything about? How did that go for you?
  + *[The vast majority of people will say it went poorly. Tease out why they think that is.]*
* Often we start a relationship by asking folks to do something—come to a meeting, make a donation, help out at an event—and then wonder why so few actually do.
  + **Effective asks are built on strong relationships.** We often jump the gun and ask people to do things for us before we have any relationship with them.
  + This often leads to us asking **for the wrong thing**, which leads to a “NO” and can even stunt the relationship going forward.
* So, how do we make sure we ask for **the** **right thing**?
  + First, we need to figure out who the other party is and what *they* want or need. *[Begin referring to stick figure page]*
* I’d like you all to meet my stick figure friend, Bob Broker. Bob is from Sandstone, MN—an area of the state that my organization covers, but an area in which we don’t have much of a presence yet.
  + I’m a navigator looking to establish some regular office hours in Sandstone, but I don’t have office space, nor do I have many connections there yet.
  + I’m planning to meet Bob for coffee next week to see if there is a way we might be able to work together in some way.
* There are plenty of things I could ask for, including (but not limited to):
  + If I can spend a few hours every so often at his office, assisting consumers who need to enroll in public programs
  + If we can partner on some promotion in Sandstone
  + If I can refer my clients who need help selecting a QHP to him
  + If I can put my flyers and business cards in his office
* In order to determine which of these asks, if any, are right for Bob, I need to get know him a little bit.
* What are some of the things that I might need to know about Bob so that I can feel confident I am making the right ask of him? *[Record answers on stick figure page]*
  + How long he’s been living in the community
  + How long he has been doing his current job
  + A bit about his organization and its mission
  + More about the organization’s structure (i.e., how many people are on staff? Do they have any office space?)
  + What he likes about his job—why does he do it?
  + Some of the barriers Bob has faced in his own work.
* *[When finished recording answers, in large letters, write “SELF-INTEREST”]*
* All of this—what the person cares about, what their struggles are, their organization’s mission, etc.— makes up what we call their **self-interest.**
* When we are hoping to build a partnership with someone, it’s not enough to know what *we* need or want, and ask for it.
* We need to know what *the other party needs,* too, and how it aligns with our own self-interest.
* The places where both our needs and wants intersect is called our **shared** **self-interest**.

**Demonstrating & Practicing “Making the Ask”**

**(35 minutes)**

**Section Notes**

*Demonstrate a real “Making the Ask” conversation for the group. When conducting the demonstration, invite someone to the front of the room as if you are inviting them to a real “Making the Ask” conversation: establish the purpose of the conversation and time limit, so the participants get an idea of how to make an invitation. Choose a demo partner that you think would be willing to speak in front of the group and willing to share a bit about themselves. Sit down during the demo. Be mindful of the 70/30 rule, and demonstrate a clear, concise ask. End the conversation by setting up your next check-in time and method of communication.*

*After the demo, ask participants to practice their own conversations. During their practice, participants should pair with the same partners they met during the icebreaker. They will have 15 minutes total to practice (or roughly 7 minutes each). Each person should get a turn leading the conversation. If they don’t get all the way through, that is okay; the most important part to practice is the exploration of the person’s self-interest.*

**Facilitator Script**

**Debriefing the Demonstration**

* To help you understand how you can explore what your shared self-interest is with a potential partner, I am going to demonstrate “Making the Ask”
* *[Complete invitation and demonstration as described above. When finished, first debrief with your demo partner, then with the large group.]*
* *[Discuss first with your demo partner]*
  + How do you feel about that conversation?
  + Did this differ from the conversations you’ve had with potential partners before? How so?
  + Did you feel that the ask I made of you was appropriate? Why or why not?
  + Is there something else that you think would have been more appropriate, or more in line with what your goals/needs are?
* *[Discuss next with the group]*
  + How did you feel about what you just saw?
  + What makes you nervous about having these kinds of conversations?
  + Is there anything you saw me do that you’re excited to try out?
  + Is there anything you would have done differently? Why?
  + What did you think about how I ended the conversation? Why do you think I did it that way?
* These conversations can seem a bit unusual at first—that’s because they are uncommon!
  + We live in a very transactional world and we are all busy people; we don’t usually take the time to get to know someone before we ask them for what we need.
* **You don’t always have to end with an ask**.
  + You might decide that this person or organization is not the best fit for a sustained or ongoing relationship, and that’s okay.
  + You could also leave the conversation still unclear on what the right ask might be. That’s also okay! It’s better to not make an ask than to make the wrong one. Just be sure to end on a good note and make a plan to talk again soon.
  + If you DO make an ask, however, be sure to make it as clear as possible, and establish a timeline and structure for future communication.
* These conversations should follow what we call “**the 70/30 rule**”: you should only talk about 30% of the time.
  + Be sure to share a little about yourself so they understand your own self-interest, but you should mostly be listening.
  + This is because when we are talking half the time or more, we aren’t listening as much as we should be!
* “Making the Ask” conversations are also a great way to ease any tension that might exist between you or your organization and the potential partner; talking face-to-face, one-on-one, allows you both a chance to answer concerns or questions clearly and directly.
* “Making the Ask” conversations should always be done in-person, should be scheduled in advance, and should always finish on time. They generally last 30-45 minutes.
* “Making the Ask” conversations are NOT:
  + Sales jobs—you should aim to invite people into partnerships that make sense for both of you; it doesn’t do anyone any good to ask a person to do something that isn’t helpful to both of you; in fact, it harms the relationship.
  + Chit-chat—talking about the weather, gossiping, and other generally aimless conversation is a waste of everyone’s time. Your aim should be to identify what this person’s self-interest is and to determine whether you feel there is a possibility for a partnership

**Practicing “Making the Ask”**

* Now you’re going to have a chance to practice one of these conversations with your partner! In a minute you’ll find the partner you met at the beginning of today’s session.
* I’m going to give you 15 minutes together—that’s a bit more than 7 minutes for each person to practice the three steps of making an ask:
  + Exploring the other party’s self interest
  + Making the ask
  + Establishing goals and responsibilities
* One of you will practice leading the conversation, and then I’ll tell you to switch so you can each take turns leading.
* Remember, you don’t have to make anything up! **Be honest with each other** about your self-interest. You never know—maybe you’ll start to build a real partnership today!

**Debriefing the Practice**

* *[Discuss:]*
  + How did everyone feel about their practice?
  + Was anything difficult about it?
  + Did anyone find out anything interesting about their partner?
  + Did your partner do anything that you thought worked well?
  + Did anyone get to make an ask? How did it go?
* These kinds of conversations are uncommon, and are not always easy, but they are necessary to complete the job at hand.
* Effective outreach takes a village! To be the most effective and efficient, we need to build strong partnerships based on our shared self-interest.
* The best thing we can do when we go into one of these conversations, is not make any assumptions about what we think the other person might need, want, or care about

**MAINTAINING THE RELATIONSHIP**

**(5 min)**

**Section Notes**

*Includes tips on how to maintain an effective relationship once it has been established. This is not a discussion-heavy section and can be done quickly if the trainer is running short on time.*

**Facilitator Script**

* Once a relationship is established, it’s important to be intentional about how you are maintaining it. Some of the best relationships have been torpedoed by lack of communication, so communication is going to be the most important thing to establish.
* What are some ways that we can ensure we stay in clear communication with our partners? *[Try and tease out the following:]*
* Make a plan with the partner for **how you’ll communicate**:
  + How often and in what ways you will communicate? Should there be a weekly phone call or in-person meeting, or can things be taken care of via email?
  + Who will need to be in communication with whom? Will you be each other’s points of contact or is there another person that should be included?
* Discuss **shared goals and timeline**:
  + Make sure you’re on the same page regarding your overall goal together and discuss the possibility of establishing benchmark goals. It’s important to talk through these things so you know what you can expect from one another.
* Get **clarity on roles**:
  + Who will be doing what part of the work? For example, if establishing shared office hours, is there a certain amount of promotion you’re supposed to do? Who will bring what materials? Does it make sense to designate an event “lead”?
  + Discuss what your resources and strengths are as a starting point for figuring out who should be handling which part of the work.

**SESSION EVALUATION**

**(10 min)**

**Section Notes**

*This section is an easy way for the facilitator to get a sense of how participants are feeling with the information they just received. If you are continuing on in a long-term support role for the participants, consider making note of how everyone says they are feeling, and checking in later on with those who seem uneasy or unhappy.*

*When everyone has responded, the facilitator should ask 2-3 people to elaborate on their feelings. Drawing on what has been expressed, share a lesson related to the topic of relationship building (e.g., “this work is not easy and it’s certainly uncommon. But everyone faces barriers to doing this work, and by being strategic in who we are building relationships with, working out of our shared self-interest, etc., we can accomplish more than we ever could by working alone”).*

*Before participants leave, briefly hand out (or refer them to) their Key Concepts and Creating External Partnerships handouts as supplementary materials for them to take home.*

* We’re nearing the end of today’s session, and I want to thank everyone very much for participating.
* I’d like to hand out a couple of supplementary materials for you to take home.
  + The first is a sheet that has tips on Creating External Partnerships and includes examples of organizations people have partnered with in the past.
  + The second is a Key Concepts handout that has all the key definitions and points that we covered in today’s session, for your reference.
* To help me continue to make these trainings better, please fill out the training evaluation form you should have received and return it to me. It shouldn’t take long!
* Before we go, I’d like to go around the room and have everyone share one word about how they are feeling coming out of this session. *[Facilitate this process and carry out the full evaluation and lesson referenced above.]*
* Thanks again for participating today! I’m excited to hear all about the great relationships you all will build in the future!
* *[Adjourn.]*