



Telling Stories  
Moving Mountains

## **California Elder Economic Security Initiative**

### **Messaging Memo**

#### **INTRODUCTION**

During the month of January, the California Elder Economic Security Initiative team and a communications subcommittee of the Cal-EESI Steering Committee undertook a messaging process to pinpoint the key, underlying messages that we can all use to convey the essence of Cal-EESI to the primary potential users of the Elder Economic Security Standard: Legislators, Advocates and Direct Service Providers. The final outcome of this involved process is a messaging tool, in the form of a chart and related fact sheet, that can and should be used by all members of the Cal-EESI coalition of organizations and individuals in communicating about EESI and the California Elder Economic Security Standard.

#### **MESSAGING CHART & FACT SHEET**

This messaging tool, composed of this introductory memo, the messaging chart and the fact sheet, contains three different categories of information: Topline Messages, Assertions and Supports/Specifics. Each of these categories and its essential function is described in detail in the sections below.

The Cal-EESI-specific Topline Messages, Assertions and Supports in the chart attached were identified through a facilitated messaging process led by Kathleen Russell Consulting. These messages were then honed through the lens of an extensive review of existing Cal-EESI and national-level EESI collateral, interviews with members of key target groups and research on related initiatives. Research ranging from speaking with key members involved in the Massachusetts initiative and reviewing documents employed there, to talking with financial planners and organizations servicing the elderly, informed our message selection and presentation of the Elder Economic Security Standard and the California Elder Economic Security Initiative.

## **TOPLINE MESSAGES**

The following fundamental definitions and phrases were arrived at through a consensus-based, facilitated messaging process with the communications subcommittee of the Cal-EESI steering committee and a few key members of the Cal-EESI staff. These messages represent the most basic concepts behind the California Elder Economic Security Initiative:

- **Topline Message #1** -- Led by the Insight Center for Community Economic Development, Cal-EESI is a statewide, research-driven initiative at the forefront of a national effort to raise awareness and promote policy change to ensure that older Californians can live with dignity and economic well-being in their own homes.  
*\*Note that based on our review of language employed, we have learned that many national groups, such as AARP, prefer to use the term older Americans. During the facilitated messaging session, steering committee members agreed that the use of elders/older Americans may change based on audiences.*
- **Topline Message #2** -- Cal-EESI will introduce a new, realistic measure of what it costs for California seniors to make ends meet and remain in their own homes. This new initiative will provide information that legislators, advocates, direct service providers and others have needed to make more informed decisions about retirement and the financial stability of older adults.
- **Topline Message #3** -- Cal-EESI brings together a diverse group of organizations and experts, supporting the only California-specific comprehensive, data-driven and localized initiative of its kind to measure and promote income adequacy for the elderly.
- **Topline Message #4** -- Cal-EESI is a broad-based coalition of organizations that reaches across all sectors and is dedicated to ensuring the economic well-being of elders and their families in California.
- **Topline Message #5** -- Cal-EESI's success will be determined by the number of people aware and involved, the number of people and institutions using the Elder Standard, and ultimately by a paradigm shift in policy, advocacy and direct services to better meet the needs of California's elders.

## **ASSERTIONS**

The Assertions section of the messaging chart contains messages intended to provide the necessary backup to prove your Topline Messages to your audience. A Topline Message should almost always be followed up with the appropriate assertion to provide the listener with evidence as to why the Topline Message he or she just heard is important. In other words, the Topline Message sets the stage and informs the listener of the “what,” then the Assertion provides the listener with the “why.”

Assertions are crafted to support every detail of each Topline Message, providing more information about each of the elements of the broader message to your listener. For example, **Topline Message #1** provides the listener with an array of information about CAL-EESI, from the fact that the program is statewide, to the program’s purposes of raising awareness and affecting policy change and the fact that this entire initiative is aimed at improving life for elderly Californians. Having laid all of this information out there for your listener, you must then define each of these separate elements – providing them with information about “why” EESI is a statewide initiative, “why” the initiative will go about “raising awareness” and “why” this will improve the lives of elderly members of our communities.

You’ll find a detailed listing of Assertions as they relate to each of the Topline Messages in the attached chart.

## **SUPPORTS & SPECIFICS**

The Supports and Specifics section of the attached chart is the most customizable piece of your messaging tool. This section provides the concrete facts and backup you will use in convincing your listener of the validity of your Topline Messages and Assertions.

Your Supports & Specifics add the “how” to your “what” and “why.” These important details can range from specific facts about the structure of the initiative, to statistics that explain the Assertion that the elderly in California are having trouble making ends meet. As you prepare to use these messages with a specific audience, you may also consider adding personal anecdotes and testimonials to the list of Supports & Specifics.

As you use this Messaging Chart and Fact Sheet to communicate about Cal-EESI, you will pick and choose what Supports and Specifics are most appropriate within the context of the conversation you are having.

## **MOVING FORWARD WITH MESSAGING**

While the messaging tools contained within this memo are intended to make the process of communicating about Cal-EESI as simple and streamlined as possible, it is important to keep in mind that these documents are ever-changing. Truly effective communication must be tailored to the individual receiving the information from you. Your Topline Messages will remain relatively fixed across audiences, but as you move into Assertions and Supports, you will find that your messages are tailored more and more to the individual or group with whom you are communicating. Assertions and some Supports crafted specifically for Cal-EESI's three primary audiences are already included in this memo, however Supports & Specifics should be tailored to each region or individual receiving the messages.

It's also important to keep in mind that these are living documents that will need to be continuously revisited. These particular tools have been developed within the context of Cal-EESI's launch and early implementation, and are specifically intended to communicate the essential features of this new initiative to audiences who have never encountered such a program.

### **CONTEXT**

The tools contained within this Messaging Memo provide a framework for basic, hard-line messages about Cal-EESI. These messages are versatile and can be used in a wide range of contexts, from speaking to reporters to advocating in Sacramento. However, these basic messages are not intended to take the place of the broader values frames that you will also want to establish, or the contextual hook you will emphasize based on the specific time, place and relationship within which you are operating, such as:

- **Current Context** – every time we discuss Cal-EESI, it will be within the broader context of the current political, budgetary or social climate, as well as within the context of the regional affiliation of the listener
- **Individual Hook** – each conversation should be tailored to the individual receiving the information, and one needs to be aware of his or her predispositions, leanings and soft spots
- **Listener-Prompted Ask** – be sure to remain flexible; the listener will often provide you with hints as to what his or her values frame is, giving you an opening to share appropriate supports/specifics, or to better target your request for support or solicit appropriate input

### **VALUES**

Each of the concrete messages and details presented in this memo reflect an underlying set of core values. Here are a few such concepts

that may help you to connect on a more fundamental level before diving into the details:

- People who have been productive members of society for their entire lives deserve our attention, respect and support as they age and their circumstances change.
- Elderly and aging Americans ought to have the opportunity to plan for how and where they will spend their retirement years.
- We are a society of hard working people who anticipate having the means to sustain basic needs when we reach retirement age.