

MEMORANDUM

To: U.S. Programs Board of Directors
From: Communications Working Group
Date: January 31, 2012
Re: Integrating Communications into U.S. Programs' Work

The U.S. Programs' Board in October decided to explore how to amplify the voices of the Open Society Foundations and our grantees in the United States and help shape the conversation about open society issues and values.

To assess how best to achieve these goals, the Board created a working group, with Joan Dunlop and Bryan Stevenson serving on the committee. Over the past several months, the working group met regularly and held interviews with experts from communications firms, foundations, and advocacy organizations.¹ The committee discussed recommendations that could enhance the communications capacity and operations of U.S. Programs that we believe the Board should consider.

The challenges to open society today are great. We are in the middle of a presidential campaign in which corporate money is playing an increasing role, rising economic inequity, and increasing intolerance toward marginalized communities. U.S. Programs, which consists of board members, staff, and grantees, can and should speak out when others are silent. We can withstand criticism without backing down. Committee members believe strongly that U.S. Programs has the reputation and resources to make a difference on crucial problems that require bold, innovative approaches. Through our grantees, we have power and reach, as well as access to an impressive spectrum of expertise and voices. The committee members agreed to the following:

- Communications should be fully integrated in all programmatic work at all stages—a cultural shift that is already underway in U.S. Programs.
- U.S. Programs needs to be poised to take full advantage of opportunities to advance the open society narrative. These opportunities may be responses to court decisions that we prepare for months in advance or an unexpected event that we can exploit at a moment's notice.
- We should intensify our work to strengthen grantee communications efforts and, where appropriate, align their messaging in our core areas.

¹ Experts included Carter Eskew, Founding Partner and Managing Director of the Glover Park Group; Doug Hattaway, President of Hattaway Communications; Douglas Gould, President of Douglas Gould and Company; Jennifer Palmieri, Senior Vice President for Communications of the Center for American Progress Action Fund; Orlando Bagwell, Director of the JustFilms Initiative at the Ford Foundation; Robert Perez, Senior Vice President of Fenton Communications; and Tom Freedman, President of Freedman Consulting. Notes from interviews with Eskew, Palmieri, and Freedman are attached as examples. All of the notes from the expert meetings can be found on Karl.

Below, the working group has outlined our goals with immediate and long-term steps. This is a working document, and the committee looks forward to the Board's suggestions for improvements and modifications.

At the Outset

We should weave communications into our programmatic work at the very beginning of strategic planning. The Center for American Progress, for example, never comes up with a goal and later plans how media engagement can help achieve it; rather, it considers communications while defining the goal. As U.S. Programs staff and our grantee partners are thinking about what we want to accomplish, we should also be discussing communications strategies and building them into proposals. Every time we make a grant, we should have a real sense of a grantee's ability to communicate and what it plans to accomplish.

In-House Capacity

The committee considered our available resources. While no one would propose that we grow to the 80-strong communications staff and myriad consultants of the Gates Foundation, it is clear that more staff and program resources will be needed to accomplish the goals of the Board. There currently is one staff person dedicated to communications for U.S. Programs (as well as communications staff in our Washington and Baltimore offices), who works closely with and has the support of the Foundations' Communications Office, which consists of media outreach, web, and publications teams.

The working group recommends that a new U.S. Programs communications staff person, approved in the U.S. Programs budget for 2012, would focus on pushing out our messages through social media and outside media outlets.

As U.S. Programs expands its activities to mount campaigns, including hiring a campaign manager, communications should work in tandem. Additional resources could be necessary to expand our efforts at placing Open Society staff, board members, and grantees on radio and TV as well as ramping up our placement of opinion pieces and blogs in prominent media outlets.

The working group also recommends that U.S. Programs hire consultants for discrete communications efforts. Consultants are often the most flexible and effective way to extend an organization's reach and amplify its voice.

Strengthening and Aligning Our Narratives

It is important to recognize U.S. Programs' primary role of granting money to other organizations. While we undertake our own communications and advocacy efforts, we also invest in others to advance open society in the United States. Some grantees, such as the Center for American Progress, Media Matters, and Color of Change, to name a few, are sophisticated communications machines, while other grantees scarcely engage in any communications efforts. There was broad agreement in the working group that it is important to strengthen grantee communications efforts. Within our priority areas, we should survey the communications capacity of the field and our grantees. If capacity is limited, grants for media training, messaging, and communications staff should be considered.

The working group also felt that open society interests will be advanced by strengthening the ability of grantees to coordinate so that their messages are amplified. With this approach, broad-based Foundations' branding efforts receive limited attention and resources. This has the obvious advantage of reflecting the reality of our work: we seek change by supporting grantees and focused activities in program areas.

Just as our grants reflect an overall approach to each area, we should also strengthen our efforts to shape the narratives within these areas. We should provide grantees, colleagues, and others with research that can inform their communications work so that they contribute to reshaping the narrative on our issues. Clearer and more unified messages will minimize the chances of conflict and help us to make bigger gains in our core areas.

Grantees can be resistant to aligning their messaging and engagement strategies with others working in the same field. They see the advantages of cultivating distinct voices, and often possess a competitive desire to be the organization most quoted, especially in the most elite media. But if organizations are presented with compelling logic and evidence that it is more effective to talk about their issue in a way that enhances a mutual goal, they will often start doing so, while still retaining their individual identities.

Advancing Our Narratives

To win support for our open society narrative, programs should have focused, clear, and achievable goals, which will vary significantly depending on the issue. Experts say we should stick as closely as possible to the U.S. Programs' priorities. Many in the committee believe we need to go further, and that U.S. Programs should have a prominent and opportunistic voice on a full range of open society issues, even beyond those on which we have immediate involvement. We all agree that there will be occasions when we may need to speak out on issues that we do not work on directly but in which we do have a strategic interest, such as prison conditions.

Evaluation of Engagement

A recent convening at the Gates Foundation brought together several foundations, members of the media, academics, and communications professionals to discuss evaluating the impact of engagement through media. By all counts, it is a difficult task that is half art, half science. As challenging as it may be, an evaluation plan should be part of any media strategy. The OSF Learning, Monitoring and Evaluation Working Group, which includes U.S. Programs, is now developing a planning and assessment framework that, among other things, will help ensure that communications strategies are included from the start in all initiatives and that we can assess the impact of these strategies. We should also provide the funds necessary for our grantees to do the same. The exercise makes it possible to alter failing strategies and replicate successful ones. It also forces the question, "what are we hoping to accomplish from this?" thus helping to clarify goals.

George Soros's Role

New research regarding public opinion about George Soros was conducted independently of the Foundations. As we contemplate options in communications, we must frankly and clearly address the role of our founder, his ongoing communications, and his existing reputation here in

the United States. While he is actively communicating on a range of issues and for a reasonable period of time thereafter, the Foundations voice will be heard in the context of George Soros's overall approach and statements, among both elites and broader publics.

So what does this mean for the work of U.S. Programs?

- Let substance rather than brand identity lead in core areas of focus.
- Continue to devote substantial energy to more balanced media outlets, such as the New York Times and NPR, and reach out widely to local and community media, including social media.
- Build individual leadership voices within and across U.S. Programs' core areas.
- Build internal and external communications capacity, with a plan for transition when George Soros stops his communications efforts.
- Address tactical issues, including providing tools to grantees attacked for receiving funding from U.S. Programs/the Open Society Foundations.

Next Steps

With feedback from the Board, communications will begin the process of finalizing a plan for implementation. Immediate steps could include:

- Create a comprehensive communications plan for 2012 based on U.S. Programs' new priorities, including media pitches, op-eds, and TV and radio appearances.
- Hire an additional staff person and name an advisory committee for our U.S. communications efforts.
- Media train U.S. Programs leaders and grantees in television and radio appearances and Op-Ed and blog writing.

It is our hope that this transition can be accomplished over the next 18 months.

Expert Notes that Accompany Memo
“Integrating Communications into U.S. Programs’ Work”

Experts:

Carter Eskew, Founding Partner and Managing Director
Dee Dee Myers, Managing Director
Beth Tritter, Managing Director
Samuel Hiersteiner, Vice President

Firm/Organization:

The Glover Park Group

Background/Experience:

For the last 10 years, the Glover Park Group (GPG) has provided consultancy services in a variety of areas including public policy, lobbying strategy, research, message development, branding, social media and other efforts. It has extensive experience working with foundations and nonprofits.

Integrated projects are a core focus for GPG and cater to the firm’s ability to bring together a diverse staff with a wide range of specialties and the right skills to make projects succeed. The majority of the staff who work in the firm’s Washington, D.C., Los Angeles, and New York offices come from non-governmental organizations (NGOs) and foundations, with a large number of them coming from the Hill. They have helped many foundations maximize their impact by helping them determine goals, use their own voices, structure grantmaking to maximize communications capacity, and directly assist grantees in advocacy and communications.

GPG staff has helped a large global health foundation determine advocacy goals for the foundation and its grantees. They have also provided technical assistance to grantees in responding quickly to the debates of the day. For the UN foundation, GPG acted as the coordinator of an international family planning project. This included working on social media strategy, as well as communications and advocacy training workshops. For the Hewlett foundation they coordinated the work of a coalition that included NGOs, think tanks, and businesses. They ran and executed the communications strategy and wrote grant proposals.

GPG helped the non-profit microfinance organization FINCA International take advantage of new attention brought to it after two people affiliated with FINCA won a Nobel Prize. GPG worked with FINCA to develop an international communications campaign. They started by looking at FINCA’s structure and held a series of meetings with its executive committee, the CEO, and the board. They held in-house communications workshops that addressed major internal challenges. GPG helped persuade FINCA staff about the benefits of a comprehensive communications strategy. GPG’s efforts resulted in FINCA having its best fundraising year ever and demonstrated to FINCA the success that can come from having an integrated communications strategy in all areas of the organization.

INTEGRATING COMMUNICATIONS INTO ORGANIZATIONS:

Integrating communications into organizations often requires a culture shift. The examples above help highlight GPG's broad experience in helping change the culture within organizations and helping them integrate communications into their larger work.

One example of how GPG helps organizations hone in on how they can achieve their goals is our work with the UN foundation. We devised a plan for integrating communications officers into each of the foundation's major functions. Over a period of six months, GPG facilitated conversations to help determine concrete and achievable goals. GPG looked at grantmaking portfolios and at communications and advocacy opportunities and created an overall communications plan that was integrated into the broader organization.

It can take a while for communications to really become ingrained but when it does it will take an organization to a different level of engagement. An advisable first step for many organizations is to start in one specific area and then integrate communications into the other divisions.

Expert:

Jennifer Palmieri, President, Senior Vice President for Communications

Firm/Organization:

Center for American Progress Action Fund (CAP)

Background/Experience:

John Podesta founded the Center for American Progress based on a theory of change that saw CAP as both a think tank and communications organization. The people who came to CAP had to have that understanding. There was no other progressive think tank that combined the two. Other leading organizations like the Brookings Institute and Urban Think Tank had shied away from communications.

Jennifer Palmieri's work at the Center for American Progress uses an approach based on what she learned from her time at the White House. To have an impact, advocacy and communications has to be built in from the very beginning. It doesn't work to come up with an idea first and figure out how sell it afterwards. It's very hard to influence from the outside [of government] and it's incumbent on you to come up with a communications strategy at the front end.

Integrating Communications into Organizations:

CAP is a young institution and communications is part of its DNA. This gives it an advantage as it can be harder for older establishments to retool and try to thoroughly integrate communications into their operations.

Communications is the biggest program at CAP. We have policy teams on the economy, healthcare, energy, religion, and national security. We also have a Progress 2050 program that works on the policy impact of changing demographics in the United States.

CAP communications has a staff of 50 to 60 people, including about 30 bloggers. The ThinkProgress blog has the charge of defining progressive debate and the Think Progress War Room serves as its center of gravity. We don't micromanage or edit the blog. It is extremely valuable and helps drive the news. MSNBC gets a lot of content from ThinkProgress. We have a team that sells CAP products like reports, analysis, blog posts, and talking points. We have two press secretaries, a vice president of communications for c3 efforts, and a full time TV and radio booker. We also have cross cutting agents and an external affairs department that works with the Hill.

In the fall through December we go through a strategic planning process for each policy area. We ask ourselves three test questions: 1) What do we want to do? 2) How does communications play a role? 3) What is happening next year that can be used as a jumping off point? For this third question, it is important to keep in mind what the big debates will be, regardless of whether we like them or not.

Part of our work is still devoted to fighting the day to day battle while also trying to keep the broader and longer term view. Communications is fully integrated into the weekly policy team meetings. We look at the coming weeks and what's happening on the Hill and discuss the reports, analysis, talking points, blogs, etc. that are coming out.

Our early work focused on what it meant to be a progressive. We tried to have a narrative arc that started a century ago and still resonates today. It is the belief that anyone, no matter who they are or where they were born, should be able to succeed if they are willing to work hard. We believe this is necessary in order to form a more perfect union. In our work we try to recapture Constitutional values and instill the country with more pride.

Our big projects have foundational documents that have staying power. Two years later, they should still mean something. For example we created documents on progressive growth and economic strategy and did a 2005 universal health care plan. Neither got a lot of attention when we created them, but we lived off them for years. Based on those documents, we create op-eds, blog posts, and quick analyses like "The 10 Worst Things About Romney's Economic Plan." The tool we use for making news products is called OPTIC. It stands for original, personal, timely, interesting, counterintuitive or controversial. The product needs to reveal something, have original analysis, show or be from someone who is personally impacted, and be something unexpected. The product can suggest ways of impacting debate or wedging an issue into debate. For each product, we think at multiple levels. We use blogs to drive debate. We work with progressive partners, i.e., unions for a big day of action, and we will offer what we have to help with door knocking and ads.

A recent project we did has had some good results. In the spring, oil prices were escalating. The Ryan budget plan had passed and was getting a lot of attention, but it was not breaking through that it was bad policy. We did an analysis on oil and gas subsidies with a break down by

company. We also did analysis of alternate policies that could have strong public appeal. We did positive and negative research. For example, we did a poll that showed the oil subsidies were really unpopular. The poll also found support for controlling climate change. We took the research to the White House and the Hill. The president used it as an issue. But it really gained traction when it was combined with the Ryan budget. Allies like unions and environmental groups picked it up and held the Republicans accountable. At local town halls the information was used to pit Medicare cuts against oil and gas cuts. That's when we really started to break through.

Expert:

Tom Freedman, President

Firm/Organization:

Freedman Consulting

Background/Experience:

Tom Freedman is an advisor to leading political figures, corporations, and non-profit organizations developing policy ideas that become part of an effective strategic message. His approach is to use communications to achieve objectives rather than to simply get attention. The first step is to decide what a win looks like and then to determine the strategies to help achieve that.

Integrating Communications into Organizations:

Freedman Consulting has worked with Rockefeller, Ford, and Hewlett on integrating communications work into their greater programmatic work. Freedman feels an important starting point is to focus on the policies and politics of any given organization. With foundations, the biggest issues are usually about policy, but at the end of the day, the metrics used to measure success are often the number of newspaper mentions. In reality, that is not the best indicator of success.

How do we reach the people we most need to reach? Sometimes it's not the biggest audience or the general public that is important for a win but a targeted audience of 50 people in health and human services. It's important to carefully consider how to craft the message and how to pre-empt attacks. In this process, we work with grantees on what the message is and how it's delivered and validated.

As much as we think we might know what people think, in reality we don't know. Effective polling is necessary to find a message that works to move people and not one that makes the people who already agree with you feel good. It's a democratic tool. We cannot intuit what people think.

One strategy for developing messaging is to work with republican polling firms or other unlikely allies to break the code on a shared interest.

For foundations, inclusion of grantees is crucial. When we've helped foundations integrate communications into their programmatic work, we found it necessary to include the grantees in the process. We may be hired by the foundation, but we have direct relationships with the grantees. It can't be a bifurcated process.

When making a new effort to integrate communications throughout an organization, it's important to get the right people into the room at the right time. It's also important to meet with some people separately. When you have very policy oriented advocates, they may not buy into the value of communications at first. One technique that we use is a "landscaping" exercise in which we interview 50 or so people to get a view of the field in an objective way.

You need to obtain objective data points before any strategic integration campaign can be addressed. We often convene conversations with communications, programmatic staff, and grantees; then with those findings move forward.

It is a mistake to inform people that they must integrate communications into their work; instead, show the value that communications can add. Do early work with programs that buy into using communications and get an early sense of what a win can actually look like. Others will see its value and want to incorporate it into their work or feel a sense of competition to achieve what the other programs have.

The most effective way to show the value of communications work may not be an op-ed or a radio show. There are many and varied opportunities. More creative thinking can take you farther and show more success. You can have lots of newspaper articles but still lose in the end. Big wins need concrete and narrow goals, not abstractions. What is the best way to get there? Sometimes the smartest people are also most abstract, and may not be the best bearers of your message. You should always keep note of whatever wins you achieve while trying to accomplish your larger goals.

Be careful about insisting on talking about something only in the manner we feel most comfortable with rather than in a way that can move people. Developing messages and language for communications should not become a contest about who can demonstrate the most purity in the room.