

Vision, Values, and Voice: Communications, Philanthropy, and Health Opportunity for All

2014 Grantmakers In Health Annual Meeting on Health Philanthropy Plenary Address

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I'm going to talk about The Opportunity Agenda and share a few thoughts about voice and philanthropy, and funders versus grantee voice. I will also talk to you about what we've learned through research, analysis, and on-the-ground experience, and communications to move hearts, minds, and policy, communications for social change.

At The Opportunity Agenda, our mission is building the national will to expand opportunity in America. Health opportunity, the opportunity to enjoy the highest attainable standard of health, has always been a part of our mission. Our work involves analyzing public opinion and media research and experience; looking at culture and pop culture trends, including the arts; and analyzing law and policy and their impact on either impediments to opportunity or pathways to experiencing it. We take that research and share it through tools and strategy conversations and training. We trained over 500 communicators over the last year, and we work with partners to build public support and public policy for greater and more equal opportunity for everyone in our country. There are a number of resources available at www.opportunityagenda.org, one of which is our new communications toolkit where you'll meet our communications superhero, Helvetica Bold. Her word is mightier than the sword.

I wanted to lead off our conversation of communications principles with a quiz, and this is a quiz about branding and communications. If I said to you, "Car plus safe," what brand?

Participants: Volvo.

If I said to you, "Computer plus creative plus genius?"

Participants: Apple.

Steve Jobs is smiling somewhere. But why do you know that? It's not because of facts. I would bet that none of you or very few of you know the actual safety statistics of a Volvo. There's no way (that I know) of quantifying the cool factor or the creative factor of Apple. Rather, it's a set of values and experiences that has been communicated to you over and over and over again, in this case by two corporate brands. Those are principles that transcend corporate public relations and advertising and have to do with the way in which we communicate, the way people receive information. This is very much about humans and the human condition more than it is about corporate advertising.

Here's an example I found in my mother-in-law's supermarket: this brand – K-R-U-S-T-E-A-Z. You have to wonder who thought it was a good idea to have a pancake brand called "crusty ass" pancakes. My mother-in-law says, "Alan, it's Krusteaz. Does it really matter?" But here's the point. A lot of us in this room are selling "crusty ass" pancakes. We are communicating in a form and in a language that only five people on Earth can understand, and those people already agree with us. We're using terms that have no meaning outside of rooms like these, and then we're surprised when the facts don't persuade. So think about Volvo and think about Apple. Those shouldn't be our only guides. Think about how they're communicating and what they understand and how much the "crusty ass" pancakes people are missing out.

FOUR KINDS OF COMMUNICATIONS

Typically in our world, there are four different kinds of communications. The first is **branding**, not just of the Apple and Volvo kind, but here's who we are, what we stand for. If you're a nonprofit, it's important for fundraising. It's important for political credibility. If you're a foundation, it's important so that grantees and others know that you're someone to come to or that you're not someone to come to.

A second is **campaign communications**. We often call that the 50 percent-plus-one, because it might be how do I get someone elected or block a law. Sometimes it's how do I get kids to stop smoking. It's a campaign. It tends to be limited in time, and the messages are often short-term.

There's **crisis communications**. Hopefully none of you will run into that, but you might. Remember the nonprofit ACORN that was brought down by some bad decisions combined with the lack of a crisis communications plan? When I was at the Ford Foundation, we dealt with a few communications crises, and I would say that we were somewhat but not as prepared as we should have been, and I think there were some lessons there.

The last category is the **long-term moving of hearts and minds**. That's something we tend to pay less attention to, but in the arc of social change is much more important. One of the reasons why it's important is because when we choose campaign communications, and for that matter crisis communications and branding, we need to be thinking about that long-term arc, as well as the moment.

For example, some of you will remember messages saying that undocumented immigrants should have access to health care because, otherwise, nannies might get tuberculosis and infect the children in their care. The message tested well (meaning there were some people who were not persuaded by other messages but were persuaded by this one). Think about the long-term message that that communication was spreading about who immigrants are, whether they're a part of us and a part of our society, or whether they're a threat. Is it us versus them? Are they outsiders?

We have to constantly be making tough decisions about something that might work well in the short term but might also undermine long-term goals. Sometimes you're going to choose the short term. Sometimes lives are at stake, and it's the right choice to make. But it needs to be made intelligently and with a full understanding of all the implications.

IDENTIFYING STRATEGIC AUDIENCES

We often talk about educating the general public. There is no such thing as the general public when it comes to communications. None of us have the resources to reach everyone in the country or state or metro area, and the good news is we don't have to in order to achieve our communications goals. Rather, we need to be thinking much more specifically about audiences.

One way is in terms of how audiences fall in terms of support. There's the base. These are people to be mobilized. They would agree with us, but we need to mobilize them to act and to share and persuade others. There are the persuadables who are on the fence. They could be with us, but they aren't yet. Then there's the opposition, the people who we will never convince of our position. We should not be exerting any resources to persuade them because they're by definition not persuadable. But we have to understand that they're also trying to persuade our persuadables, and so we need to be investing in stories and communications that can counteract their position. And remember, you are the opposition for some other folks, and they're not going to convince you. Remember that, because often we talk only to people who already agree with us or only to those people who will never agree with us.

The other way to think about it is in terms of decisionmakers and influencers. Sometimes you have direct access to the decisionmaker, and you need to come up with the most persuasive message for that person or institution. More frequently, you're communicating to people or institutions that will in turn influence the decisionmaker. Thinking about audiences can help you be strategic with resources and communications.

CONNECTING AND INSPIRING AUDIENCES

There are ways to connect across audiences. The way to do it is to come up with an overarching narrative that is rooted in values, shared by the people who are already with you, the people who could be with you, and either shared with the opposition or infuriates the opposition, which is okay because sometimes it causes them to show their true colors.

If I told you something was a David and Goliath story, you'd immediately know what that narrative is. If you're a person of faith, it might have one particular meaning. We might use a particular way to describe it to you. If you're less religious, it might be different. If you're a teenager, you might be describing it in terms of bullies in the schoolyard. That narrative cuts across lots and lots of different audiences, and it's rooted in the values of the little guy or woman overcoming steep odds.

FOUNDATIONS' COMMUNICATIONS STRENGTHS

Funders have a big-picture perspective, so you're able to see entire fields and endeavors in ways that most of your grantees, most reporters, most people you're communicating with cannot because that's not rooted in their mission. That's something very important that you can bring to communications.

You have an independent voice. Sometimes it's perceived independent voice, but fair enough. You are able to take a position to convey information in ways that often are not immediately suspect to some audiences in the way that an advocacy organization might be or a for-profit speaker who has a profit motive. You're able to help define what issues and problems matter, and that's perhaps the most important part of your voice. The fact that you have decided as a mission to address certain issues and that you're putting your money where your mouth is to address those issues is very important in helping frame the debate and set the tone for what matters in the places in which you work.

What's working and how, and what I see in analyzing media and communications, including on health and health care issues, is that solutions are so frequently lacking from the discussion.

Who's leading the way? You're helping identify some of the leaders who are worth listening to, and that may be an uncomfortable role, but it's important for you to understand that that's part of what your communications do with different roles and stakeholders, who's doing what, what are the different positions.

WHAT CAN FOUNDATIONS CONTRIBUTE TO GRANTEE'S COMMUNICATIONS?

How can you best invest in grantees' ability to communicate effectively?

- ▶ **A Green Light:** The first is simply a green light, an encouragement to do so. Some of the most effective communications sectors of the 20th century, for example, conservative think tanks—the American Enterprise Institute or Heritage Foundation—helped reframe the debate in the '80s and '90s about what mattered and what worked. That was due in large part to significant strategic investment by the Olin Foundation and the Scaife Foundation. At one point—I don't know if this is still the case—30 percent of those institutions' program budgets were devoted to communications and media. Let me say that again: 30 percent of their program budget was devoted to communications and media. I'm betting almost none of you could think of a grantee for whom that's the case.
- ▶ **Space and Incentives for Collaborative Strategy:** Typically, no one organization can bend that curve. There needs to be collaboration and agreement about the big story that we want to tell. Research on public opinion, media coverage, cultural trends, and culture and entertainment is very important there. You can invest in narrative and message development and testing.
- ▶ **Training and Skill Building:** People tend to rise to the top not because they're necessarily effective communicators or managers in the outside world but because they're good at what they do, they're good producers. If we're lucky, they're also good systems people and good managers. They're probably very good in insider communications. But when you're suddenly thrust into a leadership role and you're talking to a diverse set of audiences, you're often not ready for that.

Training and skill building are absolutely crucial, and especially important in social media (especially for those of us of a certain age) and infrastructure—the staffing, the consultants, the technology, rapid response, the things that institutions need to do. It won't be the natural instinct of your grantees for every new dollar that you give them to say, “This is definitely going toward communications,” because they may not have the green light, they may not have been rewarded, they may not yet have the training and expertise. Think long term about cultivating the communications culture of your grantees and your sector.

- **Evaluation:** Evaluation is really difficult in the communications field, but very important and is getting increasingly sophisticated. Social media gives us a lot more ability to do that than in the past.

HUB-AND-SPOKES APPROACH

Many of you are funding organizations that will never be big enough to have a communications team. For those groups that are working together, you can often have a communications hub. Encourage groups to come together and really work that through rather than imposing it from outside, which is rarely successful. Thinking about how there could be a central institution that is consistently doing opinion research and message testing, analyzing media coverage, training people, especially at the regional level, is sorely lacking but very important.

SIX PRINCIPLES FOR CHANGE COMMUNICATIONS

Here are the big principles for communications for social change.

- **Positive Vision and Values:** There's a reason why Martin Luther King Jr.'s greatest speech was not called “I Have a Complaint.” For so many of us, 90 percent of our communications are about what's wrong. There are disparities. There's unequal health opportunity. The systems aren't working. The system is broken. That story absolutely has to be told, but research and experience show that unless you can actually discuss and articulate the positive vision, what you stand for, what the world will be like if you're successful, it's very hard to engage persuadable audiences. The people who are already with you will continue to be with you, although they might not work as hard to accomplish your shared goals. But the people who are persuadable probably will not, even if they care; it's hard for them to know where you're headed.

Out of that comes the idea of leading with values, and this is not something that many of us do, but it's very important. Typically many of us lead with the policy side, especially those of us in the data and policy analysis world. “I want to talk to you about the Affordable Care Act, the community development block grants, etc.” Imagine you're at Thanksgiving dinner, and you're sitting next to your cousin, and she asks, “What are you working on?” You say, “Well, the ACA needs some tweaking.” She turns to your other cousin because she doesn't know what you're talking about, and she's pretty sure it's really boring.

That's not the story that we want to tell on the outside. There's a reason why we have this kind of rarefied language among experts. It's shorthand. It makes it easier to discuss; it's easier to identify who knows what they're talking about. As soon as you bring that to persuadable audiences, we start to lose ground.

The next level is issues: immigration, early childhood education, and the like. The problem there is that people know what those things are typically, but they're bringing their own narrative and story to them. If I say to you, I want to talk to you about K-12 education, you're probably thinking about your kid and his or her teachers and the teacher you had. Perhaps some of you have been teachers; you love the teachers union; you hate the teachers union. You're not coming with a blank slate, and so often you're not hearing what the person communicating with you is trying to say because you've already got a narrative in your head. It might be a helpful narrative to that speaker, but it might not. And if you're one of the persuadables, it's frequently the case that it's not.

Nine times out of 10 we recommend leading with values. This is not what you believe, but what

you believe in. These are widely shared tenets like community, which is the idea that we're all in it together.

Opportunity, the notion of prevention and safety, these are things that are widely held. They're not the only values that people have in their heads, but they're extremely important values that are widely shared. By beginning a conversation, beginning an engagement or storytelling or a video with those values, you've got people's attention. Often people are invulnerable to facts that don't fit with values and a narrative that they can understand. Think about how often in philanthropy—and I would say especially in health-oriented philanthropy—we're throwing statistics and numbers and disparities at people without having described that vision and value.

We know some of the values that are most effective; the first is **opportunity**. Now, I know what you're thinking. Big surprise, the guy from The Opportunity Agenda thinks we should be talking about opportunity. We're called The Opportunity Agenda because in lots and lots of research and experience and consultation with plenty of folks, that value of opportunity comes to the top again and again, and it's one that cuts across ideology and party. The idea that everyone deserves a fair chance to achieve his or her full potential is one of the most widely shared values in the United States. The notion of equal opportunity, that what you look like, where you come from, should not predetermine your life chances. There's disagreement about whether opportunity is currently equal in the United States or what needs to be done about it, but that value is widely shared.

Community is the idea that we're all in it together, that we share responsibility for the common good—one of the most important values when it comes to issues of health and communications around health, and especially public health. It's not always the dominant value in people's heads. Often they're thinking only about personal responsibility issues or about the just-world theory, which is the idea that if something bad happens to you, you probably deserved it. But, in fact, that community value is absolutely crucial, and people do have that value in their heads.

Prevention, goes without saying, but people often need reminding that prevention is an important value, and it just makes **common sense**, which is the next principle—that we need to focus on what works based on evidence, experience, our own ingenuity, and our ability to solve problems. The idea of **investing in the future** is essential, that we have to do it, that we can plan ahead and create the kind of world that we have articulated in terms of vision and values resonates with a lot of people.

These are very important ways of starting a conversation, and sometimes it won't make sense to start with them, but you want to make sure that you circle back to those universal values.

- ▶ **Tell a Systematic Story:** The next principle is telling a systemic story, the idea of stepping out of that sole personal responsibility frame. This is not to say that personal responsibility and individual decisionmaking are not important to issues of health or social justice but, rather, they are the default thinking of the vast majority of audiences. If you're trying to tell a story about social determinants of health, which I call opportunity, or you're trying to tell a story about racial disparities in health or any public health story or epidemiology issue, you need to make sure you're stepping out and telling a systemic story. Individual stories are absolutely crucial. They're why a lot of us are in this work. Reporters want them; political leaders want them. The stories we choose to lead with are very important, cuing people that there are systemic causes and solutions that they also need to be considering.
- ▶ **Explaining and Over-Documenting Barriers to Equal Opportunity:** Next is explaining and over-documenting barriers to equal opportunity. What does that mean? No matter how much evidence you think is needed to convince people that health opportunity is unequal for some people, groups, and communities, you need 20 times more. People do not believe that that is the case, and I have observed dozens of focus groups, including of people of color, who reject the facts. The facts that so many of you in this room know to be verified again and again are rejected by large segments of society once they're shared. So part of the solution to that is over-documenting the barriers in a compelling way.

- **Emphasize Solutions:** When people are hearing only the problems, even people who care, there's issue fatigue. For example, "I've got to get my kids to school, my elderly parents, and now you're talking to me about food deserts? What am I supposed to do about that, honestly?"

At least half of your communication should be about solutions and what your audience can do about it, and the solution should be intuitive from the way in which you've described the value and the problem. If you say, a hundred thousand kids are killed by parents due to abuse every year and the solution is let's support parents, there's a disconnect for most people, because their default is a criminal justice response. There's a role for the criminal justice response, but if your goal is to make sure that we prevent problems of child abuse by parenting skills and support, you need to make sure that you've told the story in a way that is not necessarily so sensational but actually tells the story of the problem you want to solve.

- **A Positive Role for Government:** Not all of the work that you are doing necessarily relies on government. There are a lot of attacks from both the left and the right on the role of government, which is part of our democratic process. The result often is that you have audiences who don't believe that there's an effective public role for anything, not so much because they don't think the role is right, but because they don't necessarily trust that government will be effective. And sometimes they're right.

There is support for government as a way we come together to solve common problems, planning for the future, making and enforcing fair rules, protecting the public, preserving pathways to opportunity. Telling that story is important if there is any point at which you feel that a public response or role is going to be part.

- **Avoid Myth-Busting:** I'm going to end with a story. My wife and I—our older daughter just started high school—went to the high school before she started. They were going to talk to us about challenges facing high schoolers and making the transition. The principal spoke, and she was great. The head guidance counselor spoke, and he was excellent. Then the head of security spoke and said, "If you believe the rumors, then you'd think that this high school is an open-air drug market. But, believe me, it's not an open-air drug market." So, once again, not an open-air drug market. She then proceeded to tell us all the reasons. I could not tell you one of them, honestly. My wife and I were in a fetal position. We're sending our kids to an open-air drug market.

Research, including public health research, shows that if you give people myths, you bust the myths, and you come back to them two weeks later, what do they remember? The myth, absolutely.

The antidote is telling our affirmative story. If someone asks a specific question about a myth, you have to answer it. But we should overcome the falsehoods and the misperceptions by telling our affirmative story over and over and over again, more effectively, more loudly, and with greater precision and strategy than the myths that are coming out.

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