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Ideas for Summit Commitments

I. Business

1. "Caring Adult" (Goal One) -- Business establishes a mentoring program at its work sites
2. "Healthy Behavior" (Goal Five) -- HMO uses volunteers to help the frail elderly; LensCrafters provides eyeglasses for 2 million
3. "Work that dignifies (Goal Three) -- Pillsbury "KAPOW" program at all plants worldwide
4. Airline provides free/discounted fares for volunteers to travel to Habitat sites
5. "Educational experiences" -- Prudential's youth service program in elementary schools
6. General Mills uses back of cereal boxes to tell kids about service

II. Youth and Education

1. Colleges commit 25% of their work/study jobs towards service
2. Colleges give preference in admissions to those who have done significant service
3. Students/school commit a fixed number of volunteer hours to a specific nonprofit.
4. Schools match education awards earned by national service participants
5. A medical school commits to having a certain percentage of residences in low income clinics.
6. An education school could pledge to have volunteer teaching a part of the graduation requirement

III. Foundations

1. Make service part of the grantmaking criteria
2. Community foundations: create a central "citizen's fund" that individuals can donate to
3. Foundations sponsor national training for service leaders
4. Family foundations "adopt" local family that is trying to get off welfare
5. Create local entrepreneurial venture capital funds for citizens with innovative ideas
6. Foundations support post-Summit local summits; foundations support citizen service around one of the five national goals

IV. Communities of Faith

1. Churches, synagogues or mosques could each adopt someone on welfare and make it their mission to get this person off welfare ("work that dignifies")
2. Churches, synagogues and mosques provide "safe" places for citizens to meet

V. State Governments

1. Each state matches California's pledge by committing to make sure that every disadvantaged young person who wants a mentor can get one.

COMMITMENTS STRATEGY

The Summit will ask organizations from the three major sectors -- private (business), nonprofit, and public -- to make commitments towards increasing the volume and effectiveness of citizen service in the country focused on achieving our five national goals. These commitments would be announced and celebrated at the Summit and, along with commitments made subsequent to the Summit, implemented between the Summit and the Year 2000. The W.K. Kellogg Foundation will work in partnership with the Points of Light Foundation and The Corporation for National Service (the co-sponsors of the Summit) to develop a core leadership group that will lead the commitment process and will serve as an important "think tank" on citizen service in the future.

The following concept paper proposes a strategy for the commitment process.

The Nature of the Commitments

The commitments made by organizations at the Summit must be bold, national in scope, and local and profound in their impact. They must serve as models for what other organizations in the sector could do to increase citizen service across the country; either individually, or in collaboration with others. The commitments could be defined in three ways:

- 1) An organization could commit to changing its own organizational policies or systems; for example, a private foundation could make citizen service a criterion for all of its grantmaking or an airline could provide free transportation for volunteers.
- 2) An organization could commit to do something "structural" that would help millions of citizens get involved in service; for example, a division of colleges could give preference in admission to those who have done service or the major television networks could agree to carry regular programming related to service.
- 3) Every organization could commit to increasing citizen service towards achieving one of the national goals defined by the Summit. These goals include:
 - a) Caring and supportive adult relationships in the life of every child;
 - b) Safe places in every community to gather, meet and work together;
 - c) Educational experiences that create confidence, teach life-long lessons, and develop skills for employment;
 - d) Personal prospects for work that encourage healthy behavior;
 - e) Opportunities to give back to others through one's own associations and organizations.

For example, a business who wants to help achieve the first national goal could commit to establish a mentoring program in all of its worksites; or a church could help achieve the second national goal by committing to providing sites for teens to gather. Or, a company could target the fourth goal by providing job training to welfare recipients.

In order to define its commitment, each type of organization in a sector would draw on the interests of its people, its own "distinctive skills and competencies," and the work it has already

done in communities. In order to achieve the Summit vision, organizations from all three sectors would be asked to make commitments. They include:

- I. The Private Sector: Businesses -- large and small, from a variety of industries
- II. The Nonprofit Sector:
 - a. Communities of Faith -- individual congregations, as well as national organizations, representing a variety of faiths
 - b. Human Service organizations -- national and local nonprofits
 - c. Educational institutions -- K-12, as well as the college and university level
 - d. Private and community foundations
- III. The Public Sector:
 - a. Local, state and federal government (represented by elected officials such as mayors and governors)
 - b. Government institutions (e.g.: Post Office; IRS; HUD)

The most powerful and important commitments could come from "intrasector" commitments, where organizations collaborate across sectors to increase citizen service and make a significant impact on communities. Often, the barriers to achieving community change occur not because of a lack of resources, but because organizations within a community (or, on a national level) are not working together. Nonprofits and government organizations could commit to work together to better provide services to families and their children, using citizens to increase their impact; businesses, churches, and schools in a community could develop year-round learning opportunities for youth and adults. Or, through the Summit, barriers to citizen service itself -- such as volunteer liability issues or increasingly limited time for individuals to volunteer -- could be addressed through the commitments made by organizations working together. Although these "intrasector" commitments would be difficult to develop prior to the Summit, we will set out to accomplish such commitments long-term.

The specific commitments should be defined through a process in the months leading up to the Summit event, from now until February 1997. The commitments would be announced at the Summit event itself, in Philadelphia, and implemented between February, 1997 and February, 2000, where the actual outcome of the implementation of the commitments could be shared with the country at a second national Summit.

The nature and scope of the commitments is very important for two reasons. First, the scale of the country's serious social problems demands that every institution and individual play a role in addressing them; however, the current volume of effective work is not sufficient to change these problems nationally. There is an urgent need for organizations to tap their resources and find pragmatic ways to restore citizen engagement as a way of life in America. Therefore, this commitment strategy is an important way to launch that process.

Secondly, these commitments will serve as examples to others, and will be unveiled through the Summit process through the press, through the Internet, and through special events involving the Presidents of the United States (such as a televised signing ceremony at Independence Hall during the Summit event). Therefore, the commitments must be bold and impactful so that other organizations nationwide will be inspired to make their own commitments in their own communities.

By the time of the Summit, the goal would be to have hundreds of commitments from every sector. However, we would hope to have as many as 35 "leadership" commitments from the three sectors that would be highlighted through the Summit process and who could serve as the core leadership group that would challenge their peers nationally to make commitments. This "two part" strategy for the commitment process is outlined below.

The "Leadership 18," an affinity group of the largest 18 national nonprofits in the country, has determined that it will make a collective commitment to the Summit. They will also be represented in the Core Leadership Group.

Gaining Commitments: The Process

We would gain commitments from organizations using two strategies:

- 1) working with a leadership core group of 25-35 CEOs/organizations; and
- 2) making a broad-based appeal for commitments to organizations and associations of organizations across the country, through the individuals and organizations that attend the Summit, and through media outreach during and following the Summit event in Philadelphia.

Leadership Core Group

A leadership core group of the CEOs from 25-35 major organizations from the private, nonprofit, and public sectors would be convened in the fall prior to the Summit event to:

- a. Define commitments within and across sectors that would increase citizen action significantly within the country;
- b. Commit their own organizations to take (an) action;
- c. Help the Summit stakeholders reach out to other organizations within their respective sectors.

This leadership core group would be comprised of perhaps as many as 7 businesses from the private sector; 21 from the nonprofit sector (with 7 each from three subsectors: communities of faith; nonprofits and private and community foundations; and educational institutions); and 7 from the public sector.

By convening these different sectors, we would hope that both the level and the impact of the commitments would be consistent; in addition, by sharing ideas across sectors, the commitments could possibly lead to greater collaboration and communication, leading to greater impact.

This core group, comprised of leaders in their fields, would help communicate the seriousness and potential of the Summit plans to other organizations and the American public. We would communicate the commitments made by this group through our outreach to national media and coverage on the Summit Internet Web page. This group would be asked to attend special event(s) with the Presidents at the Summit event; for example, an agreement signed by the leadership core group could be presented to the Presidents in Independence Hall on the opening day of the Summit.

Our plan is to convene another national Summit in the Year 2000, in order to celebrate what has been done and to share the results of the work that was done in the three years following our

initial convening. Therefore, it is important that this leadership core group continue to work together following the Summit event in February to help pursue ideas nationally or regionally that may be suggested by local post-Summit activities in communities around the country, and to serve as an important “think tank” for citizen action.

The Points of Light Foundation, The Kellogg Foundation, and The Corporation for National Service will convene the leadership group in early fall at Kellogg in Battle Creek, so that this group would have enough time to develop their own commitments and assist the Summit stakeholders in their outreach to other organizations.

Broad-Based Appeal for Commitments

Once the Leadership Core Group and their peer commitments have been announced at the Summit, a call would go out to the country for other organizations to also make commitments. Clearly the 25-35 organizations would be “standard setters” for a far more extensive process of other leaders and organizations making commitments. This longer-term broadbased request for commitments could be made in two ways: through the community delegations that attend the Summit and through the media.

Through the Summit Participants. We anticipate that 75% of the attendees at the Summit event will be individuals from over 200 communities nationwide. Their goal will be to attend the Summit, learn from others, meet together in their individual community groups at the Summit itself, and then return to their own communities to develop and implement a plan that focuses on one or more of the national goals. Many of these individuals will represent organizations in the three sectors defined above. As part of their involvement in the Summit, we are asking that they hold their own summits following the February meeting and that they develop their own core leadership “commitments” group as a part of that process that would reach out to their peers for commitments.

At the Summit event in Philadelphia, the community delegates would learn from each other and from the sessions as to how to develop and implement such a strategy. With this “cascading” approach, the Summit could then multiply the number of commitments across the country.

Through the Media. The drive for commitments could be announced at a press conference at the Summit with interested organizations invited to call an 800-number for further information. (This press conference would follow months of media outreach in which the examples are given of outstanding actions that are being taken by organizations around the country, and would highlight the commitments of the leadership core group 35). Though the most significant commitments are expected to be generated through personal, rather than public appeals, we must make this opportunity open to everyone. By developing materials that could be sent out to organizations following the Summit, we would provide information about the entire Summit process and how organizations could become involved over the three year period. We would track the results of this effort through an evaluation and tracking process developed by FERA (the Summit evaluators) over the three years.

cc: Melinda, Shirley

September 19, 1996

Harris Wofford
Chief Executive Officer
The Corporation for National Service
1201 New York Avenue, N.W.
8th Floor
Washington, D.C. 20525

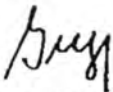
Dear Harris,

I want to thank you again for the extraordinary meeting that we had on Monday. You were very generous with your time and your counsel. I am equally grateful for your willingness to continue to help lead this effort.

Attached is a memo from Rhonda and Chad. They have attempted to briefly capture your insights regarding approximately 150 individuals playing the major role of selecting a local community delegation or designing their own local process to select the delegates. This is only a piece of the invitation strategy, and we will want each of you to look at the final product before we submit it to our Joint Board Steering Committee for approval.

With regard to the names of individuals who might fit into the description in the following memo, we will be asking that if a person or place is selected to participate based on your recommendation, we hope that you would be willing to make the initial contact to describe the Summit. I believe your personal connection with each of these people could make a real difference in their commitment to the Summit itself. Again, thank you for your time and assistance.

Sincerely,



Gregg Petersmeyer
Chairman, The Presidents' Summit

MEMORANDUM

TO: Summit Planning Group

FROM: Rhonda Taylor and Chad Mayer

DATE: September 19, 1996

RE: Invitation Strategy and "Community Individuals"

First, thank you for participating in the meeting on Monday. We and the rest of the staff feel as if we accomplished many things pertaining to the invitation strategy and planning for follow-on initiatives for the years between the two national summits. Also, we feel blessed to have had a chance to get all of you in the same room for a day of work.

Looking over several pieces of the notes from our meeting, we have put together some ideas that we felt would be beneficial for you while you are thinking about who should be the contact person in the 150 or so communities. Please look over and comment on this singular piece of the invitation strategy. We will be sending to you a full proposal for your review in the first part of next week.

Please take the week-end to think more about who ought to be involved at this stage from the communities in which you have worked. Please feel free to fax your suggestions of individuals to contact with regards to the invitation strategy to us on Monday. The fax number at the Points of Light Foundation is 202/223-9256. Again, thank you for your willingness to help.

Strategy for Inviting Summit Participants

The Summit will be held for approximately 2,000 active citizens who represent a broad cross-section of individuals, institutions, and communities. There will be three major types of participants at the Summit:

1. members of community and state "delegations" from across the country;
2. individuals representing organizations who will make commitments to support the work of these "delegations" over the next three years; and
3. national leaders, including the Presidents and First Ladies

Local Delegation Selection Process

Most of the Summit's participants will come from 150 - 200 communities from all 50 states. The communities will represent a mix of large and small cities, metropolitan and rural areas. Each community will send a *delegation* of 10 or so people. Collectively, each delegation will represent exemplary front-line "doers" as well as those with institutional power and administrative authority in the community.

In order to create a process that leads to good community attendance at the Summit in Philadelphia and follow-up in local communities after the Summit, the staff is requesting the assistance of local, state, and national leaders (including the Summit Planning Group). They will be asked to select individuals who can assemble the kind of delegations we seek and who can help those delegations work over the next three years to achieve the goals to which they commit themselves as part of the Summit process. We seek at least one individual from each of the 150 - 200 communities to be responsible for assembling a community delegation.

We realize that this is a somewhat informal "word of mouth" strategy. If done well, however, we believe the process will result in delegations that will come together with surprising effectiveness at the Summit and will accomplish great things in the three years between the first Summit and a celebration Summit in the year 2000. We hope that delegations are highly unconventional in both their make-up and in their ultimate effectiveness.

Clearly individuals must be chosen carefully and must be fully committed to the three year process. This is admittedly not an institutional approach. We are emphasizing individuals for two reasons:

1. individuals, of course, not institutions, solve problems; and
2. "institutions" as such are more likely to have a vested interest in naming someone for political, funding or institutional gain, than is an individual *as long as* he or she knows the

community, is in fact, and is considered by others to be, a person who works in a truly collaborative way and possesses real moral authority in the eyes of his or her peers.

Role of the 150 or so Community Leaders are:

- Agrees with the vision and the goals of the Summit
- Has led/does lead an organization, initiative or program in the community that has used citizen service as a critical element
- Is well-respected in the community as an individual who gets things done for the good of the community
- Has access to, and knowledge of, a wide variety of publics/organizations/individuals
- Is willing to lead a selection process that would result in a delegation with the appropriate characteristics
- Will be a part of the delegation that attends the Summit, and will support the local community action following the Summit
- Be as diverse as our country

Factors to consider in assembling a delegation:

1. Keep in mind diversity of race, age, economic ability and physical ability.
2. Choose a delegation that reflects persons from the following areas reflective of their community: elected official, professional manager (like the city manager), communities of faith, educators (both k-12 and higher ed), corporate (largest employer and small business); neighborhood leaders (like homeowner associations or neighborhood councils); social service delivery agencies; philanthropic groups (community foundations, private foundations or corporate foundations); media, and youth.
3. Delegations should include 10 individuals with at least 3 members being individuals doing exemplary work in their community. These 3 individuals should be an example of the positive force of citizen action.
4. Individuals included in the delegation should either be persons who are in positions to advance the capacity of citizen action or are already doing so.

Additional responsibilities of the community individual include:

- act as the primary convenor of a meeting of the local delegation prior to the Summit, in order to review the objectives of the Summit;
- help locate assistance and connection to resources within one's community to financially support those attending the Summit who may not otherwise be able to attend;
- be a member of the local delegation that attends the Summit; and
- provide support and leadership in the follow-on initiatives agreed upon by the community delegation in their work at the Summit.

We would hope that people selected to be a part of their community delegation would share many of these personal traits (regardless of institutional affiliations, age, gender, etc.):

- Those from local communities:
 - People with known track record, excellent results.
 - People with faith in possibilities.
 - Activists; can do!
 - Team players.
 - Those who celebrate success of others.
 - Know their community and its key players.
 - "Political" savvy.
 - Organizers; delegaters; visionary, inclusive.
 - Prejudice-free; fact-finders, not assumers.
 - Love challenges, especially of meshing divergent efforts into one powerful force.
 - People who you would call on at 2:00 am in an emergency; they can help.
 - **TRUSTED, TRUSTED, TRUSTED!**
- Those from State perspectives:
 - People who really know state.
 - People who are not politicized and would therefore present barriers to involvement.
 - People already familiar with key helpers and activists in communities.
 - People with clout and leverage of persuasion.
 - People who see the vision of the Summit as real, not hype.
 - People who are mature and self-assured, self-reliant.
- And we would hope to avoid the following:
 - People looking for self-grandizement.
 - All talk, no results.
 - Prima donnas.
 - Title-impressed.
 - Status-quo defenders.
 - Ego maniacs.

Note: (We are grateful to Sue Vincyard for this section)

Additional Thoughts

The ability for increasing the volume of effective citizen action in local communities and creating opportunities to meet the national goals of the Summit rests largely in that community. The importance of the individual identified to manage the selection process for a community's delegation can not be overstated. They must understand the critical value of citizen action at this

stage in the life of most communities and the possibilities to increase the effective volume of that activity to meet one or more goals as a result of a three year process beginning with a national Summit. Because they must also commit to the follow-on initiatives in their own community, it is double important that they carefully choose a delegation of individuals who also understand the value of citizen action and/or are in positions to support increased capacity for citizens to solve community problems.

The community individual will either select the community delegation or create a local process with others to select the community delegation, keeping in mind the delegation's ultimate goals of increasing the volume of effective citizen action and putting in place community strategies for achieving the national goals. He or she may seek counsel from individuals associated with community foundations, volunteer centers, communities of faith, chamber of commerce, business leadership organizations committed to service, corporate volunteer councils, private foundations, foundation associations, cooperative extension associations, interdenominational organizations, United Ways or other "Leadership 18" social service agencies.

FAXPOINTS OF LIGHT
FOUNDATION**Date** September 19, 1996**Number of pages including cover sheet** 1**TO:** Harris Wofford**FROM:** Greer Forsyth
Points of Light Foundation
1737 H Street, N.W.
Washington, D.C. 20006**Phone** 202-606-5000**Phone** 202 223-9186 X 196**Fax Phone** 202-565-2784**Fax Phone** 202 223-9256**CC:****REMARKS:**☐

Urgent

☐

For your review

☐

Reply ASAP

☐

Please Comment

MEMORANDUM

To: Bob Goodwin
Joel Orosz
Shirley Sagawa
Harris Wofford

From: Pat Bland
Gregg Petersmeyer

Date: September 23, 1996

RE: Planning Group for the Commitments strategy and the ISLG (Intrasectoral
Leadership
Group)

We look forward to meeting with you this Wednesday, September 25, from 3:30 to 5:30 here at the Foundation to discuss the commitments strategy of the Summit. We will constitute a "planning group," that will refine the specific plan of action for developing an "Intrasectoral Leadership Group" (ISLG) that will ultimately make the "lead" commitments and declare their support for service.

Attached is an agenda for a meeting on Wednesday. We have also attached Joel's draft plan of action for the ISLG, as well as our latest concept paper on commitments. Also, please find attached some suggested names of leaders in each sector that we developed with the help of many people over the last few months. From this list, we can begin to identify the "captains" for each sector that can help us develop the ISLG.

AGENDA

Meeting of the Planning Group for the Summit ISLG (Intrasectoral Leadership Group)

September 25, 1996; 3:30 - 5:30 PM

- I. Discuss concept of ISLG, and draft brief statement of principles and memorandum of responsibilities for ISLG members
- II. Draw up prioritized list of potential “captains” from each of the three sectors
- III. Discuss how to approach an individual (hopefully, President Bush) to assume responsibility for ISLG and personally make request of captains
- IV. Discuss proposed staff positions to support ISLG (ideas for individuals)
- V. Agree on next steps for the planning group



To help people help themselves

MEMO TO: Dan Moore

COPY TO: Chris Kwak
Bob Long
Frank Taylor

FROM: Joel Orosz

DATE: September 9, 1996

SUBJECT: Draft Summit Action Plan

Given the fact that the clock is ticking with regard to the Summit, I think it is important that we agree upon an action plan as soon as we can. The following plan is completely in draft, and I really need your input on improving it. Again, given the timeline, I would appreciate receiving your suggestions as soon as possible.

DRAFT SUMMIT ACTION PLAN

1. Partners (CNS, POLF, WKKF) agree on the formation of an intersectoral leadership group (ISLG). Timeline: As soon as possible
 - a) Given the short timeline, we will aim for three from the public and private sectors, and up to five from the nonprofit sector.
 - b) The ISLG will be expanded subsequent to the Summit, with the exact size and proportions among the sectors to be determined later.
 - c) ISLG is to be chaired, on a rotating basis, by a former President.
2. Partners agree on mission of ISLG. Timeline: As soon as possible
 - a) Overarching Mission: Serve as the national voice in support of citizen service for America. This includes advocating nonpartisan, supportive public policy; recommending local action to solve social problems; and, promoting intersectoral cooperation to make it all work.
 - b) Mission at the Summit: To announce a "declaration of support for service" to support and give form to the Presidents' more general advocacy for service at the Summit. The secondary mission will be to announce concrete commitments to service made by their own organizations.
 - c) Mission after the Summit: Expand ISLG to its full size; work with other leaders in each sector to develop further commitments to service; meet twice yearly to receive reports from a research arm, which could well be Les Salamon's Futures Project. In turn, ISLG will make recommendations to Congress for support of public policy, and to the National Council of Nonprofit Associations, the Conference Board, and the Council on Foundations (representing nonprofit organizations and their major funders, for local implementation).

- d) Make a summary report to the nation at the second Summit in the year 2000, documenting progress made to date, and underlining further recommendations for future action.
3. Partners agree to appoint a small planning committee to operationalize these recommendations. Timeline: As soon as possible. This committee would consist of no more than two persons each from CNS, POLF, and WKKF.
- a) Draft brief statement of principles and memorandum of responsibilities for ISLG members
 - b) Draw up prioritized list of potential "captains" from each of the three sectors.
 - c) Secure agreement on part of the general chairman of the Summit (hopefully, General Colin Powell) to personally request three captains to join ISLG, and assume responsibility for further organization of ISLG
 - d) Work with the captains to make prioritized list of potential ISLG members.
 - e) Agree on needs for additional staff to carry out plans. It is likely that two staffers will be needed; a senior staffer, to create think pieces and work directly with captains to organize ISLG; and a junior staffer, who would be in charge of the details of implementation.
4. Captains make calls, secure remaining members (three, three, up to five). Timeline: By November 1, 1996
5. First face-to-face ISLG meeting in Chicago (or some other centrally-located city) Timeline: Mid-November 1996
- a) Get acquainted, agree on agenda.
 - b) Presentation of draft declaration of support for service (which has been written by the senior staff member, and vetted by the planning committee). Suggest revisions to this statement.
 - c) Agree on draft Summit activities for ISLG; brainstorm post-Summit plans.
 - d) Inform each other of individual Summit commitments.
 - e) Agree to hold a meeting on Sunday, February 16, 1997, immediately prior to the Summit. Agree on date of conference call to finalize declaration of support for service and Summit plans.
 - f) Agree on a media strategy.
6. Summit Preparations
- a) Senior staffer rewrites declaration of support for service along lines suggested by ISLG members. Planning committee makes needed further arrangements.
 - b) ISLG members to hold conference call by mid-December 1996. Sign off on final declaration of principles and Summit itinerary for ISLG
 - c) Former Presidents are briefed on ISLG and their interest in chairing is gauged
7. ISLG meeting, February 16, 1997
- a) Review and walk through itinerary, and brief on media situation.
 - b) Rehearsal of spokespersons for role.
 - c) Agree on date for next meeting after Summit

It is clear to me that this is a very rough first draft, and I will look forward to receiving your edits. Thanks very much for your consideration.

JJO/rh

SAVOLNTEER.DOC\RAH\MEMOS\SUMMIT.OTL

STATE OF MICHIGAN



JOHN ENGLER, Governor

MICHIGAN COMMUNITY SERVICE COMMISSION

cc: Gene/Melinda
Susan R.?
Shirley

Chairperson
Michelle Engler

Executive Director
Frank Dirks

111 S. Capitol Ave.
Olds Plaza Bldg., 4th Floor
Lansing, Michigan 48913
Telephone (517) 335-4295
FAX (517) 373-4977

M E M O R A N D U M

TO: Gregg Petersmeyer

cc: Michelle Engler
Robert Goodwin
Harris Wofford

FROM: Frank Dirks, Michigan Community Service Commission

RE: Comments on Summit Planning from 9/6/96 memo and 9/10/96 call

DATE: September 11, 1996

Thank you for this opportunity to share these comments on your planning memo dated September 6, the Invitation Strategy fax sent September 10, and the conference call of that same date.

- 1) There is little that I could add usefully to the consideration of Summit names.
- 2) The goals generally strike the balance between breadth and specificity. Recognizing that Dr. King and Sen. Wofford recommended that goal #2 should be stretched to include the whole community, I would suggest that you consider using the term "public places". The use of public place in community, as distinguished from private places, would be consistent with the interest in and emphasis on the 'public square' among civil society advocates. It also would help set a useful context for discussions of community.

With regard to Mr Goodwin's concern that another set of national goals may risk being viewed through a cynical lens as just another set of national goals, I think that the relevance and importance of these goals will not be determined by the contributions made to their wording now or at the summit but in the action taken in their name during the three years after the summit.

- 3) The above point leads to what I am sure everyone recognizes is the most problematic aspect: the Invitation Strategy. A few observations:

The Invitation Strategy should be based on a post-Summit implementation strategy. How will the gap be closed between the three-year national goals and the activities during the summit? How will the momentum be maintained? Who will be responsible at the local, state, and national levels? How does this effort connect with other national initiatives like John Gardner's Alliance for National Renewal? Without thoughtfully developed answers to these questions, Mr. Goodwin's concerns about public cynicism will be realized.



Gregg Petersmeyer
September 11, 1996
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Post-summit implementation should rely on state-level networks and infrastructure. An initiative that connects local community efforts to a nationally framed message is a good communications strategy, but not a good organizing strategy. A major barrier to community problem-solving is that many community nonprofits are better connected to their national organization than they are to groups around the corner. National organizations are not naturally in a position to advance local community interests, only the interests of their affiliates in local communities.

Since one of the aims of the summit is to build community connections, the implementation strategy should work to build integrated support networks in communities and states. Whether it is through state commissions, state United Way associations, volunteer center networks, community foundation associations, Corporation for National Service state offices, or cooperative extension networks, the implementation strategy should challenge state level follow-up and continued organizing for community action. The summit planners should rely on state-level advisory groups composed of representatives of these and other networks to identify state delegations made up of diverse communities and their representatives.

Build on the strongest state networks and infrastructure. Certainly not all states have the same networks or infrastructure, but the planners should have enough information on the states to contact the leading organizing groups in the states. Almost every state has at least one strong organizing institution (service commissions, cooperative extension, foundation associations, etc.) and many have several. The summit planners should work through these leader groups and challenge them to work together where they are not already.

Use the consolidated state service plan development process as a common element across the states. Beginning this year, the Corporation for National Service (CNS) is asking states to develop comprehensive plans for service and volunteerism. These plans are intended to link all aspect of national service programs (VISTA, RSVP, SCP, FG, AmeriCorps, Learn and Serve) with traditional volunteer and philanthropic efforts in a coordinated and unified state effort. I think it would make sense for CNS and the Points of Light Foundation to work together to encourage that this collaborative planning process be used to draw local community problem-solving activities into state plans for service and volunteerism.

I hope that these comments are useful. Please don't hesitate to call me if I can clarify something or add anything further. Good luck on a great undertaking.

Michigan Community Service Commission

111 S. Capitol Avenue, Olds Plaza Building, 4th Floor
Lansing, Michigan 48913
(517) 335-4295 (517) 373-4977 Fax

Fax Cover Sheet

To: Harris Wofford (202) 565-2784
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From: Frank Dirks

Date: September 11, 1996

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Message:

FAX

Date

9/10/96

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5

TO: Shirley Sagawa**FROM:**

Pat Bland

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CC:**REMARKS:**☐ Urgent☐ For your review☐ Reply ASAP☐ Please Comment

Shirley -

Attached is the document I referred
to in my voicemail.I look forward to discussing it
with you.

Thanks!

Pat

Document 1

COMMITMENTS STRATEGY

The Summit will ask organizations from the three major sectors -- private (business), nonprofit, and public -- to make commitments towards increasing the volume and effectiveness of citizen service in the country focused on achieving our five national goals. These commitments would be announced and celebrated at the Summit and, along with commitments made subsequent to the Summit, implemented between the Summit and the Year 2000. The W.K. Kellogg Foundation will work in partnership with the Points of Light Foundation and The Corporation for National Service (the co-sponsors of the Summit) to develop a core leadership group that will lead the commitment process and will serve as an important "think tank" on citizen service in the future.

The following concept paper proposes a strategy for the commitment process.

The Nature of the Commitments

The commitments made by organizations at the Summit must be bold, national in scope, and local and profound in their impact. They must serve as models for what other organizations in the sector could do to increase citizen service across the country; either individually, or in collaboration with others. The commitments could be defined in three ways:

- 1) An organization could commit to changing its own organizational policies or systems; for example, a private foundation could make citizen service a criterion for all of its grantmaking or an airline could provide free transportation for volunteers.
- 2) An organization could commit to do something "structural" that would help millions of citizens get involved in service; for example, a division of colleges could give preference in admission to those who have done service or the major television networks could agree to carry regular programming related to service.
- 3) Every organization could commit to increasing citizen service towards achieving one of the national goals defined by the Summit. These goals include:
 - a) Caring and supportive adult relationships in the life of every child;
 - b) Safe places in every community to gather, meet and work together;
 - c) Educational experiences that create confidence, teach life-long lessons, and develop skills for employment;
 - d) Personal prospects for work that encourage healthy behavior;
 - e) Opportunities to give back to others through one's own associations and organizations.

For example, a business who wants to help achieve the first national goal could commit to establish a mentoring program in all of its worksites; or a church could help achieve the second national goal by committing to providing sites for teens to gather. Or, a company could target the fourth goal by providing job training to welfare recipients.

In order to define its commitment, each type of organization in a sector would draw on the interests of its people, its own "distinctive skills and competencies," and the work it has already done in communities. In order to achieve the Summit vision, organizations from all three sectors would be asked to make commitments. They include:

- I. The Private Sector: Businesses -- large and small, from a variety of industries
- II. The Nonprofit Sector:
 - a. Communities of Faith -- individual congregations, as well as national organizations, representing a variety of faiths
 - b. Human Service organizations -- national and local nonprofits
 - c. Educational institutions -- K-12, as well as the college and university level
 - d. Private and community foundations
- III. The Public Sector:
 - a. Local, state and federal government (represented by elected officials such as mayors and governors)
 - b. Government institutions (e.g.: Post Office; IRS; HUD)

The most powerful and important commitments could come from "intrasector" commitments, where organizations collaborate across sectors to increase citizen service and make a significant impact on communities. Often, the barriers to achieving community change occur not because of a lack of resources, but because organizations within a community (or, on a national level) are not working together. Nonprofits and government organizations could commit to work together to better provide services to families and their children, using citizens to increase their impact; businesses, churches, and schools in a community could develop year-round learning opportunities for youth and adults. Or, through the Summit, barriers to citizen service itself -- such as volunteer liability issues or increasingly limited time for individuals to volunteer -- could be addressed through the commitments made by organizations working together. Although these "intrasector" commitments would be difficult to develop prior to the Summit, we will set out to accomplish such commitments long-term.

The specific commitments should be defined through a process in the months leading up to the Summit event, from now until February 1997. The commitments would be announced at the Summit event itself, in Philadelphia, and implemented between February, 1997 and February, 2000, where the actual outcome of the implementation of the commitments could be shared with the country at a second national Summit.

The nature and scope of the commitments is very important for two reasons. First, the scale of the country's serious social problems demands that every institution and individual play a role in addressing them; however, the current volume of effective work is not sufficient to change these problems nationally. There is an urgent need for organizations to tap their resources and find pragmatic ways to restore citizen engagement as a way of life in America. Therefore, this commitment strategy is an important way to launch that process.

Secondly, these commitments will serve as examples to others, and will be unveiled through the Summit process through the press, through the Internet, and through special events involving the Presidents of the United States (such as a televised signing ceremony at Independence Hall during the Summit event). Therefore, the commitments must be bold and impactful so that other organizations nationwide will be inspired to make their own commitments in their own communities.

By the time of the Summit, the goal would be to have hundreds of commitments from every sector. However, we would hope to have as many as 35 "leadership" commitments from the

three sectors that would be highlighted through the Summit process and who could serve as the core leadership group that would challenge their peers nationally to make commitments. This "two part" strategy for the commitment process is outlined below.

The "Leadership 18," an affinity group of the largest 18 national nonprofits in the country, has determined that it will make a collective commitment to the Summit. They will also be represented in the Core Leadership Group.

Gaining Commitments: The Process

We would gain commitments from organizations using two strategies:

- 1) working with a leadership core group of 25-35 CEOs/organizations; and
- 2) making a broad-based appeal for commitments to organizations and associations of organizations across the country, through the individuals and organizations that attend the Summit, and through media outreach during and following the Summit event in Philadelphia.

Leadership Core Group

A leadership core group of the CEOs from 25-35 major organizations from the private, nonprofit, and public sectors would be convened in the fall prior to the Summit event to:

- a. Define commitments within and across sectors that would increase citizen action significantly within the country;
- b. Commit their own organizations to take (an) action;
- c. Help the Summit stakeholders reach out to other organizations within their respective sectors.

This leadership core group would be comprised of perhaps as many as 7 businesses from the private sector; 21 from the nonprofit sector (with 7 each from three subsectors: communities of faith; nonprofits and private and community foundations; and educational institutions); and 7 from the public sector.

By convening these different sectors, we would hope that both the level and the impact of the commitments would be consistent; in addition, by sharing ideas across sectors, the commitments could possibly lead to greater collaboration and communication, leading to greater impact.

This core group, comprised of leaders in their fields, would help communicate the seriousness and potential of the Summit plans to other organizations and the American public. We would communicate the commitments made by this group through our outreach to national media and coverage on the Summit Internet Web page. This group would be asked to attend special event(s) with the Presidents at the Summit event; for example, an agreement signed by the leadership core group could be presented to the Presidents in Independence Hall on the opening day of the Summit.

Our plan is to convene another national Summit in the Year 2000, in order to celebrate what has been done and to share the results of the work that was done in the three years following our initial convening. Therefore, it is important that this leadership core group continue to work together following the Summit event in February to help pursue ideas nationally or regionally that

may be suggested by local post-Summit activities in communities around the country, and to serve as an important "think tank" for citizen action.

The Points of Light Foundation, The Kellogg Foundation, and The Corporation for National Service will convene the leadership group in early fall at Kellogg in Battle Creek, so that this group would have enough time to develop their own commitments and assist the Summit stakeholders in their outreach to other organizations.

Broad-Based Appeal for Commitments

Once the Leadership Core Group and their peer commitments have been announced at the Summit, a call would go out to the country for other organizations to also make commitments. Clearly the 25-35 organizations would be "standard setters" for a far more extensive process of other leaders and organizations making commitments. This longer-term broadbased request for commitments could be made in two ways: through the community delegations that attend the Summit and through the media.

Through the Summit Participants. We anticipate that 75% of the attendees at the Summit event will be individuals from over 200 communities nationwide. Their goal will be to attend the Summit, learn from others, meet together in their individual community groups at the Summit itself, and then return to their own communities to develop and implement a plan that focuses on one or more of the national goals. Many of these individuals will represent organizations in the three sectors defined above. As part of their involvement in the Summit, we are asking that they hold their own summits following the February meeting and that they develop their own core leadership "commitments" group as a part of that process that would reach out to their peers for commitments.

At the Summit event in Philadelphia, the community delegates would learn from each other and from the sessions as to how to develop and implement such a strategy. With this "cascading" approach, the Summit could then multiply the number of commitments across the country.

Through the Media. The drive for commitments could be announced at a press conference at the Summit with interested organizations invited to call an 800-number for further information. (This press conference would follow months of media outreach in which the examples are given of outstanding actions that are being taken by organizations around the country, and would highlight the commitments of the leadership core group 35). Though the most significant commitments are expected to be generated through personal, rather than public appeals, we must make this opportunity open to everyone. By developing materials that could be sent out to organizations following the Summit, we would provide information about the entire Summit process and how organizations could become involved over the three year period. We would track the results of this effort through an evaluation and tracking process developed by FERA (the Summit evaluators) over the three years.

CORPORATION
FOR NATIONAL
 SERVICE

September 12, 1996

From: Steve Waldman

To: Harris Wofford
Shirley Sagawa
J Toscano

September 12, 1996

To: Gregg Petersmeyer

From: Steve Waldman

Re: Edelman Communications Strategy

CORPORATION
FOR NATIONAL
 SERVICE

There are some great ideas in this strategy but it suffers from a misreading, in my opinion, of the media's mood. I agree that there is more interest than in years in "what works" stories. That creates an opportunity. But we need to be realistic that those stories are still the exceptions and the dominant mood of editors is still cynical.

Specifically, while editors may believe that individuals can make a difference, they do not connect that to solving social problems on a large scale. Volunteering is thought to be "nice" and "worthwhile" but ultimately not *important*. Second, there is a skepticism that these stories can be done in an interesting manner. This is a well-grounded skepticism. Most stories about volunteer activities are not, in fact, compelling. There is a bit of a self-fulfilling prophecy here: editors don't think individual action stories are important so they assign B-team reporters who turn in underwhelming work. But at a basic level, it really is easier to make bad news stories interesting than good news stories.

That's why the strategies for coverage of the individual stories will not work unless it is preceded by some jarring big-league news that says to editors: hey, this isn't just a story for the feature well; this is important. There are only a few elements that work on that level:

- The Presidents – If we don't get a good showing among the presidents, the summit probably won't get much initial attention. Once they agree, in addition to the announcement, we should try to get them all in a room to do a public service ad. That would be dramatic. Also, to me the real key to this all along is Colin Powell. He should be viewed as just as important as the Presidents.
- Neck Wrenching Bi-Partisanship – Another attention-grabber would be if the strangest of bedfellows seemed to be working together on this. Getting Clinton and Bush is a good start but you need to do more. How about: a joint public service ad with Hillary Clinton and Elizabeth Dole, both of whom, in their own way, have championed volunteerism and service.

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National Senior Service Corps

Think about other unlikely combinations: Jesse Helms and Ted Kennedy; Ralph Reed and Jesse Jackson; the head of the NAM and the head of the AFL-CIO; Charlton Heston and Denzel Washington; Luciano Pavarotti and Bon Jovi; Jack Kemp and Al Gore etc. In fact, you might want to build the public service ads around a mix of famous people and ordinary people in their communities coming together to solve problems.

- The Commitments – This probably goes without saying but just in case: if you don't have awesome commitments all the public relations help in the world won't mean a thing. Big commitments will signal to reporters and editors that this is not just about celebrating volunteerism but about a fundamental shift in thinking about problem solving.

Incidentally, I don't think the polling questions work. If I were an editor, I would not write a story about a poll saying people think we have serious problems and would like (other) people to volunteer more. It's simply not newsworthy. On the other hand, editors do love polls. I would point the questions toward the fundamental lack of faith people have in all institutions about problem solving – perhaps contrasting that with views about whether service or individual action can help. Try doing a series of questions about people's sense of hopelessness about specific problems and the institutions that are supposed to deal with them.

We should not be appealing to the media's sense of altruism. As with the Corporate world (and these are just corporations, after all) it has to be a pitch around enlightened self-interest. We don't want to urge them to write about these things because it's the right thing to do but because there's evidence that the readers want it. In fact, why not have that be a poll question. Generally, this plan has a naïve, and sometimes insulting, view of what press will cover when it suggests that we “encourage them to write editorials on voluntarism”; have a documentary shown nationally the night of the summit; or that newspapers cover the “delegate's departure at the airport.”

Overall, this plan is quite ambitious. If we were paying for it all, I'd say it was way too gold-plated. If it's donated labor, though, it could be helpful.

Memorandum

To: Harris Wofford
From: Office of Public Affairs
Cc: S. Sagawa, S. Waldman
Date: September 13, 1996
Re: Analysis of Edelman Proposal and Recommendations for Action

We've discussed with Shirley and Steve our assessment of the Edelman proposal and developed recommendations for a Corporation response. This memorandum addresses three issues pertinent to the planning for "A Summit of the Presidents and the People on a New Era of Citizenship in America" (hereinafter "Summit"), evaluates the merits of the Edelman proposal and recommends next steps.

In light of the July 1996 memoranda and the Edelman proposal, the following issues must be addressed:

1. What is the theme for the Summit, is it consistent with the Corporation's core messages, and what benefit accrues to the Corporation's programs?
2. What resources will the Corporation commit to the Summit and how much "message control" and decision making authority will the Corporation exercise? Is our role that solely of advisor and sponsor with no ability to influence communications strategy?
3. How can we best use the Summit, including pre-Summit and post-Summit activities, as a vehicle for generating Corporation media coverage?

The Summit can be a significant opportunity to pump up national service programs, attract corporate partners and increase public support. We ought to put time and money into a Summit that directly supports local programs that get things done. We do not need yet another event that engenders a string of forums, conferences and other forgettable gatherings, the significance of which largely wilts the minute they end. Our review of the Edelman proposal raised a number of serious concerns.

Analysis of Edelman Proposal

- The words "national service" do not appear in this document, nor are Corporation programs mentioned. If we put serious taxpayer-funded resources into the Summit, then we should expect a significant return on that investment -- awareness of our programs, recruitment support, focus and reinforcement of our messages, recognition of our service leadership.
- For example, the President has done a number of high-profile, one-time summits, i.e. business leaders, with Hollywood, et al. And while these may have gotten some things started and incrementally raised public consciousness, by and large they were one-day stories. Our concern is that's what our Summit will end up being--a one-day (or two-day if we're lucky) story. An event isn't a strategy. Our deepest concern is that, to date, the message is that of "a National Summit to announce a series of mini-summits, to culminate in a Summit 2000."

- We're concerned (but not surprised) that the Edelman Summit communications strategy relies upon huge expenditures for outside consulting services. Like many "pro-bono" plans written by PR firms, this should be seen more as a "bid" than a "strategy." The promotion ideas offered are solid and unremarkable--the obvious activities--target the morning shows, pitch Generation Xers' magazines, do an op-ed campaign, announce a press conference with a famous person, et al. without a plan of implementation or set of clear goals.
- An issue raised at the joint Board meeting in San Francisco remains un-addressed -- the Summit plan does not segment-out target audiences with a specific plan to reach each one. Rather, it continues to refer to the "general public" as "the" audience. Unless they can secure an all-network roadblock for the "national showing" of the documentary, the plan, as written, is unlikely to have an impact on public opinion.
-
- Some of Edelman's suggestions should not be executed -- particularly research and polls designed to arrive at the conclusion that a Summit is necessary. Is it worthwhile to the purpose of the Summit to pay Gallup to find out if Americans think "the social problems we face constitute a crisis?" Or whether they think "one person can make a difference in another's life?"

Another idea--sponsor a TV documentary and offer corporations and foundations a chance to fund it. This program "will be shown nationally." What's the outgoing message? Who are you trying to reach? Who is right now committed to a national airing? Next, the idea for a new toll-free number 1-800-CITIZEN. Yet another toll-free number to "transform inspiration into action." What about our current ones? What about Points of Light's current number? Then, a new President's citizenship award. We already have one. The annual President's service awards--they've been around since Reagan--are of interest in the home markets of recipients. They have no national news or marketing value.

- You may recall the ceremonies that accompanied the launch of the Points of Light. They kicked off with an excellent TV PSA campaign--they had big communications partners and the networks ate the ads up. These moving and powerful ads urged people to call an 800-line if they wanted to "do something real." The 800-line referred people to local Volunteer Action Centers. Supposedly the callers were to linked with service opportunities. Bill and Mike remember at the time that local agencies complained they had no means to enlist more volunteers or place many of the callers. We never heard that this huge and costly Points of Light push added anything to volunteer programs. We hope the Summit doesn't end up that way.

To wrap this up--Edelman's general media-targeting ideas are fine, but much of this plan is just a compendium of ideas drawn from PR101, with no prioritization or strategy. The Corporation's goal should be to make sure it aims at promoting and/or supporting national service -- it should set concrete, measurable goals. As written, it aims chiefly to promote the notion that volunteering is good and more Americans should do it. Most people already think so. The Corporation's goal should be to ensure that the Summit strategy helps build identity and support for AmeriCorps, Senior Corps and L&SA, and tighten the links between national service and the larger world of volunteering.

Message Control

If we are not the principal decision maker with regard to development and implementation of communications strategy for the Summit, then we have two major problems. First, we can not guarantee that the Summit's themes and message will reinforce the Corporation's core messages -- in fact they may contradict or weaken them. Second, we are in a defensive mode where we have to

scramble to react to whatever twists and turns the Summit's communications strategy takes. In terms of planning and scheduling our communications efforts, these are inherently fatal flaws.

This is not an event where we can cut and run—we want to participate and we must participate. The challenge is to participate in a meaningful manner, get the results we want (honor our core messages and limited resources) and strengthen our partnership with POL.

The Corporation's Communications Strategy re: the Summit

- We aggressively position the CEO as “the” spokesperson on national service prior to the Summit (see “Reading” communications strategy memo). The CEO walks in having successfully positioned “Service As Strategy” using the Reading initiative as the model – and the Corporation as a laboratory of successful models to be replicated.
- The CEO and President Clinton announce the 5 recommendations produced by the post-election task force to take national service to the next level, the challenge being something like this: When folks on both sides of the aisle agree that government cannot solve all of our problems, that citizens must take more responsibility, that communities must be strengthened, that providing educational opportunity is a key priority – and, critically, the smoke of the election season has cleared – how do we employ “service as strategy” in meeting the challenges we face?
- The coordinated national service campaign is launched, using “Service as Strategy” as the message and “NS Heroes” as a thematic tool (see Public Affairs FY1997 Annual Plan), positing National Service as a laboratory of successful, replicable models of community problem-solving.
- The Corporation's aim for the Summit should be to shape it for specific results that benefit national service and its programs “Galvanizing and sustaining a new era of citizenship” and bringing Americans the message that “volunteering is a means of connecting with others” is wonderful rhetoric, but our mission is to bolster our program's specific needs (e.g. “recruiting the next generation of heroes”). The Summit communications plan says we should use the Summit to deliver -- as “core messages” -- a list of hopes and generalities that people already believe (“Individuals--just like you--can make a difference and are doing so every day.”). Individuals just like me? REALLY? This is not exactly exciting stuff, and it does not directly or indirectly strengthen our programs.
- We should assure that, two months after the Summit, The Corporation has actual accomplishments to show for it, and its “messages” should aim at results in communities--more kids taught to read, more rivers cleaned--goals--numbers--not fluff.

Recommendations

- Knowing that the Summit has too little time to carry out the broad, direction-less, un-funded plan as presented, we recommend the Corporation focus our efforts on leveraging the CEO's involvement in the National Summit rather than the Summit itself. The existing proposal spins out into mini-summits, school workshops, town meetings, annual commemoration -- a bureaucratic quagmire. Don't commit scarce taxpayer-funded Corporation resources to a series of feel good events that do not benefit our programs.
- Do use the Summit's as a means to promote Corporation messages prior to the Summit, as another hook for press, and to launch our coordinated national service marketing/recruitment support efforts.
- The CEO should request that Public Affairs be represented at all summit communications planning sessions and serve as the Corporation's communications liaison, not to lead or take responsibility for the Summit's strategy, but to ensure that our plans complement and reinforce each other.
- The CEO and General Counsel should issue clear guidance to Corporation staff on their summit roles and boundaries, assuming significant oversight from Congress and the Inspector General.
- The CEO and the Board should decide ASAP the level of resources you are willing to commit to the summit and be explicit on the criteria you will use to evaluate the return on this investment.