Communications Office Review
Final Report
11/30/07

Table of Contents

Executive Summary

Appendix (see binder; also available upon request)
- Charge to Committee
- Communications Office Mission Statement
- Background
  - Goals
  - Staff Capabilities & Qualifications
  - Activities & Projects
  - Activity by EETD Department/Customer
  - CO Expenses & Recharges
  - Survey of Other LBNL Divisions' Communications Services
- Communications Office Services
  - Research Support
  - Division Support
- Review Status Report 6/20/07
- Customer Interview Notes
- Division Council Presentation & Emerging Recommendations 7/18/07

Communications Office Review

EXECUTIVE SUMMARY

Acting Division Director Bill Fisk created the Communications Office (CO) Review Committee[1] in April 2007 with a charge to evaluate the Office's activities and develop recommendations for more effective and efficient Division communications activities.

Additional context for the charge to the Committee was provided by a mid-course meeting with Division Council in July 2007, resulting in a new mission statement for the Communications Office, as follows:

> *The mission of the EETD Communications Office is "to enhance the Division's reputation, competitiveness and impact by applying advanced communications expertise and tools in a cost effective manner."*

<u>The Committee has concluded that a dedicated Communications Office is essential to better serve the communication needs of the Division.</u> The key external, Lab and Division drivers supporting this conclusion include:

- the communications opportunities and challenges associated with the groundswell of public focus on green technologies and climate change;
- the growing recognition that incorporation of communications planning into major new and existing research programs is critical to their success;
- the call by the Lab Director and new Division Director for development of a multimillion-dollar comprehensive fund-raising campaign for the division, and the attendant strategic communications needs of such an effort;
- the need for coordination of communication and marketing activities across the division to ensure accurate, timely and consistent messages; and
- the continued rapid shift from printed to electronic and web-based communications.

In light of the above, the goals and recommended changes that follow are intended to provide the framework to assure that communications are used strategically at a divisional and research program level; that high-level

[1] Review Committee members: Joe Eto, Robert Kostecki, Kim Williams, Marcy Beck; Allan Chen, ex-oficio

communications capabilities are retained in-house; and that the CO act as a strategic networking center for providing needed supplemental communications resources.

Overall Goals of the EETD Communications Office

Consistent with the new mission of the Communications Office, the Committee recommends that the Division charge the EETD Communications Office to:

1. serve as an integral strategic partner to Division leadership and be an integral team member for all EETD-led initiatives,
2. be the default point of contact for planning, implementation and coordination of all EETD communications activities, including those conducted jointly with other parts of LBNL and the UC Berkeley campus,
3. nurture and seek to inculcate strategic communications thinking into all aspects of EETD's research programs,
4. be staffed with a stable core of experts with specialized capabilities in marketing, content, graphics and web that have been groomed to serve the unique needs of EETD's scientific programs,
5. be the hub and glue for coordinating needed resources from within the division, from other divisions, or from external sources for communications activities, and
6. be funded, primarily, through a baseline budget from the Division, but in a manner that does not place undue emphasis on a target level of recharge to individual groups within the Division.

Recommended Actions by Goal for the Division and the Communications Office

Recommended **actions** to implement each goal are presented below, with separate listings provided for actions that the Division can take and those that the Communications Office can carry out.

1. The Communications Office should serve as an integral strategic partner to the Division leadership and be an integral team member for all EETD-led initiatives. Division Council recognizes that broader strategic directions for EETD need to be addressed and that a strong Communications Office can provide key support in planning for and implementing future initiatives and programs. New and increased program funding across the Division has also underscored the need for a strategically-focused Communications Office in EETD.

- *What the Division needs to do:*
    - Change priority expectations of the Communications Office from functioning primarily as a job shop to serving an integral role in Division planning and program implementation. Announce this to the Division.

    - Include the Communications Office Leader early in strategy meetings and discussions to develop new or modify existing Division-led initiatives.

    - Approve an explicit budget for communications strategies in each Division initiative. Commit CO resources to supporting the development of and require approval of a communications/ marketing plan in the proposal for each new initiative it supports. Require existing initiatives to develop a comparable plan and budget.

- *What the Communications Office needs to do:*
    - The Communications Office role in providing strategic support to Division initiatives will be two-fold: 1) helping/coaching the initiative staff to develop the elements and budget for their communications plan, and 2) providing the implementation support for the plan.

2. The Communications Office should be the default point of contact for planning, implementation and coordination of all EETD communications activities, including those conducted jointly with other parts of LBNL and the UC Berkeley campus.

- *What the Division needs to do:*
    - Communicate this expectation and role for the Communications Office within the Division and to others across the Lab.

    - Provide adequate insights to Communications Office staff into specific policies, scientific and engineering developments and challenges, along with prospective targets for communication campaigns.

- *What the Communications Office needs to do:*
    - Promote the Division's international reputation as a center for scientific excellence and innovation through press releases, announcements, events, and awards on the Division's staff scientific and policy achievements.

    - Collaborate and team up with other communications and media groups at LBNL, on campus, in the community, etc. to distribute EETD news to the science, technology and policy communities, as well as the public, and to keep them informed of the interesting and important research taking place in EETD.

    - Publicize information about Division events, policies and procedures through numerous communications channels .

3. The Communications Office should nurture and seek to inculcate strategic communications thinking into all aspects of EETD's research programs. Based on interviews held with selected PIs and Group Leaders in the Division (see Appendix), it is clear that these research leaders welcome an EETD-focused Communications Office whose staff steps out ahead to assist in forward thinking about/planning for/implementing their communications needs.

- *What the Division needs to do:*
    - Foster keen awareness of the importance of utilizing Communications Office across the Division.

- *What the Communications Office needs to do:*
    - Meet regularly with key members of the Division's research community to discuss how the Communications Office can work as a strategic partner to enhance the effectiveness of their programs. Continue to organize focused meetings with individual PIs or collaborative groups of PIs to assess the need for developing/implementing strategic communications plans, including targeted outreach.

    - Schedule noontime seminars based on Communications Office Research Support Matrix and Basic Communications Office Responsibilities developed as a part of this review (see

Appendix). Include testimonials from PIs who have used communications support for their initiatives.

- Facilitate peer to peer PI meetings, where new/newly funded/reluctant/PIs can learn how others have used different communications strategies, learn what has worked or not, trade war stories from the communications front, etc.

- Provide PIs with realistic cost estimates for web development and graphics support. Refine estimates developed as part of this review: be clear and err on the high side.

4. The Communications Office should be staffed with a stable core of experts with specialized capabilities in marketing, content, graphics and web who have been groomed to serve the unique needs of EETD's scientific programs. [2] The right mix of expertise and resources for the most effective Communications should build on establishing/maintaining unique high-level staff capabilities in the office for marketing, content, graphics and web support. Other Division, Lab and outside resources should be tapped to provide more basic communications services and peak support. Consistent with the coaching/training recommendations below, some current in-house CO activities may be assumed by research groups over time. (See Recommendation 5.)

- *What the Division needs to do:*
  - Approve the hire of a new staff member for the Communications Office as funding allows. A high priority should be given to developing and maintaining strong in-house outreach and technical writing capabilities with in-depth knowledge of EETD's research programs. Consideration should be given to additional resources in this area to provide backup to the Communications Office Leader who is the only person carrying out these activities for the Division at present and who is oversubscribed.

[2] Not included in this review are server support and clerical/administrative functions currently housed within the Communications Office. It is recommended that these activities be addressed as a part of a broader look at Division-wide staffing, resource and organizational needs.

- Help members of the Communications staff stay up-to-date with current research so that they may effectively promote the Division's work.

- Convey to Communications Office staff that the Division has a goal of providing resources in the budget for their staff development (ranging from technical skills training to time to attend division seminars).

- *What the Communications Office needs to do:*
  - Communications Office Leader should work with the CO staff to identify training needs and technical training resources, and develop training plans for CO staff.

5. The Communications Office should be the hub and glue for coordinating needed resources from within the division, from other divisions, or from external sources for communications activities. This means that the CO will a) assist research groups to identify the level of communications support they want from central resources vs. activities that make sense for them to handle on their own, and coach/train interested staff; b) help redirect communications resources across the Division as needed and take advantage of resource capabilities in other parts of the Division and the Lab to supplement and complement the CO's core staff. This dual role provides flexibility to the Division and to research groups as their needs for communications services change.

- *What the Division needs to do:*
  - Give the Communications Office Leader the authority to pull together internal and external resources as needed to achieve results.

  - Make sure that opportunities are created for covering the research group staff effort to participate in coaching/training activities leading to a) research groups handling some activities on their own and b) tapping into these trained staff to serve as supplemental/backup resources to the CO.

- *What the Communications Office needs to do:*
  - A key ongoing role of the Communications Office should be to coach, train or provide the gateway to training for Division staff

to make it easy for research groups to handle some outreach, graphic and web functions themselves, reflecting the level of in-sourcing the PI is interested in assuming. This will allow for more efficient use of the time of the higher-level CO staff. A corollary to this is that the Communications Office can develop a cadre of trained staff throughout the Division (and in other Divisions) who can, in turn, assist the CO during peak work times.

Specific follow up action: Develop and maintain a roster of internal and external resources to support graphics, web and outreach needs on an as-needed basis .

- Search for, find and use new tools that provide the underpinnings for this coaching and handoff. As various information technologies become more integral to our work lives, new easy-to-use applications start rolling off the shelf that allow users to do some level of work on their own rather than rely on central IT experts. One current example of this is the use of the Drupal application to create a new Batteries website which the BATT group intends to maintain on its own.

- Communications training sessions for EETD staff on new topics of widespread interest should be scheduled throughout the year.

6. The Communications Office should be funded primarily through a baseline budget from the Division, but in a manner that does not place undue emphasis on a target level of recharge to individual groups within the Division. Since FY2000, the Communications Office net cost to the division (after recharge activities) has represented approximately 1.1% of total EETD expenditures. Communications Office recharge percentage of total costs has ranged from 10% to 21% (see Appendix xx). The current division net cost of 1.1% of total division expenditures appears to be a reasonable initial budget figure to cover both core and extended CO needs, though this ratio may change over time.

- *What the Division needs to do:*
  - Approve an annual budget and staffing plan for the Communications Office consistent with the recommendations above.

- Commit organizational burden to support the high level capabilities of the Communications Office. Annual recharge estimates should be developed to identify additional resources that may be needed to support sponsor-funded activities. Consideration should be given to develop incentives for the CO Leader to increase recharge activity, though not to the point where core staffing is put at risk.

- Assign Program Development Manager to serve as 'outreach ombudsperson' to help identify when an initiative/program has realized a revenue stream sufficient to pay directly for CO support.

- Working with the CO Lead, develop criteria (and attendant budget) for outsourcing, both to address fluctuations in demand for services and to outsource readily available capabilities while retaining high-level expertise inhouse. Criteria for outsourcing may change over time as strategic communications needs are defined and planned for both at the Division and research group level. (It may be necessary to bring in house what is least efficient to outsource.)

- *What the Communications Office needs to do:*
  - The Communications Office Leader, in collaboration with the Program Development Manager and Business Manager, should
    - Develop a proposal for a Communications Office staffing plan and annual operating budget. Confirm current and expected workload needs for outreach, content and writing support. Revisit budget assumptions throughout the year.
    - Report on expenditures programmatically; budgets should provide for flexibility to acquire additional resources as needed.