Justin Prudhomme:

Great. Thank you Soojin. Good morning, everyone, and thank you for joining us today on the, as Soojin said, the third and final session of the 2020 workshop on Communicating Democracy, Human Rights, and Governance, hosted by USAID Center of Excellence on Democracy, Human Rights, and Governance. Thanks for joining us these three days if you've been able to, and for the interesting presentations and engaging questions. So far, I'd like to welcome our first two speakers this morning, Ranta Russell and Edith McClintock. Ranta is the Division Chief for communications and knowledge management in USAID's Bureau for Economic Growth, Education, and Environment. She's joined by Edith, who's the the Global Development Lab, office of engagements and communication. Together, Ranta and Edith are leading communications efforts for USA's up and coming Bureau for Development, Democracy and Innovation. Over to you, Ranta.

Ranta Russell:

Hey, good morning. I hope you can all hear me, and it is just a delight to be here. Welcome to the third day of this wonderful communications workshop. It's an honor to be here among your company. And thanks Justin. Good morning to you, and as he said, my name is Ranta Russell. I'm the lead communicator for the Bureau for Economic Growth, Education, and Environment, and also thrilled to be joined by my colleague Edith McClintock, who leads communications efforts for the Global Development Lab. Our bureaus will soon transition into the Bureau for Development, Democracy and Innovation, called DDI in short, along with the Center for Democracy, Human Rights, and Governance, and the Global Development Lab, as well as several other operating units of USAID. Given that this new bureau will encompass democracy as a leading pillar, we're delighted to be with you today in your roles of communicators. We will link some information on the website, on transformation, which also includes a proposed structure of DDI, so that you can really start thinking about how the structure might affect your organization's own communications efforts and how we can work together.

Ranta Russell:

As we plan for the transition to DDI, Edith and I have the privilege of leading an incredibly strong group of communicators within USAID, who are committed to ensuring that storytelling efforts help DDI succeed. This includes... In conjunction with our colleagues in legislative and public affairs, of course... Producing content in various formats... Video, blogs, social media articles... In a way that reaches diverse audiences, such as students, teachers, entrepreneurs, civil society leaders, community leaders, and many more group and organizations. And let me turn it over to Edith.

Edith McClintock:

(silence)

Justin Prudhomme:

Thank you, Edith. Edith did mention questions. If anyone does have any questions, I want to encourage you, not only for these speakers, but for all of our presentations today. Please feel free to input your questions into the chat box on your screen, and we will get to them as time allows. I don't see any questions right now, for Ranta or Edith, but if any come up, we can maybe get to them at a later time.

Justin Prudhomme:

Next, I want to introduce the speaker for our first session today. As Edith mentioned, will be on the agency's first ever digital development strategy, presented by Michelle Parker. Michelle is a career Foreign Service Officer with USAID, currently serving as Senior Policy Advisor in the Center for Digital Development, managing the implementation of USAIDS's first ever digital strategy. Take it away, Michelle.

Michelle Parker:

Thank you so much. Hi, everyone. Good morning. It's always fun to be a speaker on day three of an online virtual conference, so hopefully I will present some information that's useful to you all, and we will have a good dialogue on questions. As Justin mentioned, I am a Foreign Service Officer, and I'm a Democracy and Governance Foreign Service Officer, so this community is near and dear to my heart, and of course I see a lot of familiar faces in the participant list. So thank you very much. It's great to be here. I have the privilege of managing the implementation of USAID's first ever digital strategy. I just want to clarify it's a digital strategy, not digital development strategy. This is a communications workshop, so I just wanted to make sure that was clear. And what is it? If you haven't been familiar with it, we launched it in April, so the timing is quite interesting. Normally, I would start with a slide that talks about why digital matters. I don't think I need to do that anymore, especially for this particular group. But I will just quickly show you what the strategy's overarching goal is. I'll give you a minute to read that.

Michelle Parker:

There's three key words I want to emphasize in the strategy goal, and it's in the very opening. It says, "Open, secure, and inclusive digital ecosystems." So what do we mean by open, secure, and inclusive? There's lot's of different models of digital engagement happening in the world right now, and we wanted to be very clear that our strategy is routed and grounded in human rights, is grounded in principles that our country is founded on. As far as open, we want to make sure everyone has equal access to digital technology. Secure, we want to make sure that people understand that their data is being protected, that surveillance is not built into systems. And inclusive ... And again, with this community, you all understand better than most. We want to make sure that every community in the country is getting access, equal access to digital technology. We want to make sure no groups are being excluded in any way. So those are the three words I really want you to focus on when you're looking at what our strategy goal is. And we'll talk a little more about that in detail.

Michelle Parker:

The strategy has two primary objectives. The first one is really focused on USAID and you all are implementing partners. And the idea is that we want to use digital technology responsibly. What does that mean? Very concretely, we don't want to introduce technology without really thinking about, what are the opportunities? What are the risks? And how do we make sure we're mitigating risks while seizing opportunities? Just a very concrete example: recently, a country that, let's say, is not very well developed in their democracy and governance space inquired about using facial recognition technology in their upcoming election. They requested assistance from USAID, and we looked at this issue. We don't have a very specific policy on this yet, but we wanted to say, "Okay, what are the risks and what are the opportunities?" The opportunity, of course... It would help make sure that we were able to track who ... Or the country, rather, was able to track who was registering to vote. Sorry if you can hear my child in the background. I'm sorry. We know this is what happens these days... Was able to vote, is able to move forward in documenting what they're doing, but the risks are also very, very prevalent.

Michelle Parker:

For example, who owns the database of the facial recognition technology? Who has access to it? How do we know that people are being protected? So in doing this analysis, we realized that this government didn't have policies in place for privacy, didn't have policies in place for cybersecurity to make sure the systems were secure. So we felt like that wasn't probably the best use of taxpayer money. So that's a very concrete example of saying, "How do we use digital technology responsibility as development actors?" So what this first objective is really talking about is that USAID... Our staff, as well as our implementing partners' staff, really need to understand what's happening with the digital technology, what are the benefits and risks of using it, and then again, what are strategies around mitigation, if there are risks included. That's really objective one.

Michelle Parker:

Objective two is talking about strengthening the digital ecosystem of the countries that we are working with, who are our partners. And this is all... As you can see, we are looking at civil society, partner governments, and the private sector are three primary counterparts, and again, you see those three magic words: open, inclusive, and secure country digital ecosystems. Now, ecosystem is a super jargon-y term, so let me try to unpack that a little bit for you. When we're looking at ecosystems, we're looking at primarily three pillars. The first one is talking about access and use, meaning do you actually have access to mobile technology? Is there connectivity in your area? Can you get wireless internet? How much does it cost? Are there issues around a digital gender divide? For example... I don't know if you know this, but I think it's around 42% of women don't have access to mobile technology in a lot of the country, so we want to make sure that we are creating access for those who may not have it. That's really the first pillar.

Michelle Parker:

The second pillar is... And this is where we all really need to be focused is digital society and governance. This is the rules and regulations around the digital sector in any specific country. This is the idea of digital rights. Do people know where their data is going? Do they have control over it? Do they have the right to say, "No, I don't want to be surveilled in this society?" This is all the ideas around censorship, disinformation, a lot of the stuff that we work on in the DRG space.

Michelle Parker:

And then the third pillar of the digital ecosystem is all about the digital economy. So that's e-trade and commerce. It's digital financial services. It's a lot of the work that my colleagues over in the E3, now soon to be DDI bureau, have been working on and will continue to work on. So these are the three core pillars when we talk about an ecosystem, so I hope that helps explain that jargon-y term a little bit more. And these two objectives are really mutually reinforcing, so as we, as development practitioners, look and say, "Okay, we really want to help the government of X with their cybersecurity program," we in turn need to understand what cybersecurity means in the development context.

Michelle Parker:

So, moving forward, that's the big "so what" out of our strategy. We have an implementation section, and I really recommend everybody read this. This is annex two of the strategy, if you haven't had a chance to read it. It's a short annex, and this essentially talks about what USAID will be focused on in our implementation. And we've divided it into four separate tracks. I'm not going to go too "in the leaves" on any of this, because there's a lot of information. So I would kind of want to know what you all want

to hear about as I go through this, so you can put that in the text box if you would like. Underneath each of these tracks, we have multiple initiatives, and each initiative has its own lead, its own team that's building this out, so there's a lot we could talk about in each one of these.

Michelle Parker:

The first one is talking about adopting an ecosystem approach to development. And as I mentioned, what we are defining as an ecosystem, it also includes things like an assessment tool, because if we're asking our missions to really start building out digital programming, which is what we're arguing, we need to make sure they understand what's happening in their country. Who are the mobile network operators? What are the issues around access? What are the issues around governance? What are the issues with e-trade and commerce? All of these types of issues are built in to the assessment. So we're doing that.

Michelle Parker:

We also have a small fund that we're creating internally, very much like EPP, where there might be digital opportunities that come around, and we want to make sure that our missions are able to seize on those and program towards those. But we want to make sure our partner community is aware of that, so that if you all identify an opportunity or a risk, that you're letting the mission staff know, so they could potentially program against it, or seek additional funds to address whatever challenge or opportunity might arise.

Michelle Parker:

The second track is called navigating opportunities and risk. You keep hearing me talk about this balance, and we really want to make sure that you all and our staff... Again, in that objective one... That we have the tools and understanding in how to navigate this, because some of the stuff is really, really hard. I am not a technical expert. I'm a democracy and governance officer, and I've had to learn this step by step. It's not super hard. It just takes time. So we want to help by providing some basic tools to understand this, and that's around closing the digital gender divide, digital literacy is a huge part. For those of you who were watching our primary, you might've remembered, for example, in Iowa, where an app was introduced but nobody was trained on it. Kind of a disaster. So that's a very good example of why digital literacy matters. If we're introducing new technologies, we need to make sure people understand how to use them. Cybersecurity and data privacy I've talked about, and then protecting children from digital harm. This is all core areas at USAID we're going to be building out as technical areas that we're going to be expanding our expertise in. For example, we're hiring a cybersecurity expert to start really looking at how do we program in cybersecurity.

Michelle Parker:

The next one is shifting to digital by default. This is much more objective one-focused, whereas the last one was objective two, helping build out those ecosystems. This one is really about how USAID and our implementing partners do business. I want to make one quick clarification for this track. When I'm talking about how USAID does its business, I am not talking about our enterprise, meaning our system that we use. That's all handled by our CIO shop, our Chief Information Officer. This isn't talking about USAID's systems like the DIS, the Development Information System that's coming online. We're talking about USAID in the programming aspect. So we're talking about our AORs, our CORs, our missions staff, folks like that. I just want to make sure that's clear, because the CIO shop has its own responsibilities

and roles. We do coordinate and we do communicate, but this is a bit of a firewall, if you will, between those two areas.

Michelle Parker:

So when I'm talking about shifting digital by default, we will be mandating that every implementing partner starts paying their staff, their subcontractors, their beneficiaries through digital payments by default. Now, there might be occasions, especially in the DRG space and authoritarian regimes where that may not be the best way, but we want it to at least be the default, and then moving forward if we need to make exceptions, we can do that. We're also going to be asking partners to collect data digitally. And this is predominantly on our M&E space. We're going to be incorporating the principles for digital development in our entire program cycle, from procurement to implementation, and if you aren't familiar with the principles, it's a set of nine, essentially best practices in the use of digital for development, and I highly recommend you all look at them. They're not a checklist. In fact, some are intentions, of being open... Open source versus secure. But the idea is that these are areas that we really need to be thinking about as we're introducing digital into our work.

Michelle Parker:

And then you'll see again here, cybersecurity and data privacy. The difference between those words here and in the previous track is that this talks about your systems, that we're expecting our implementing partners to start investing in the security of their digital systems as well as really focusing on data privacy and protecting the privacy, predominantly of our beneficiaries and of [inaudible 00:32:07] staff in the country.

Michelle Parker:

Finally, USAID of tomorrow ... We are going to be doing a lot to upscale our staff. We're building out a lot of training around all of these knowledge products that I've talked about in the last four chats. We will also be ... The plan is to have digital development advisors in every mission at the end of our five-year strategy. We didn't just want to put a hat on some poor person sitting in the program office. This is more like a "doc" role. Again, something you all will understand, where this person is responsible for helping ensure that digital is incorporated into every aspect of what we're doing throughout the program cycle, and even in the operation side. So it's going to be quite a large role, and this person will be the go-to in every mission on all things digital. We've also created an executive fellowship where USAID staff will be able to spend up to a year in a tech firm or a cybersecurity forum up-scaling and learning about new technologies. And then, as I mentioned, we're going to be doing a lot of training. So that was a very fast and quite detailed overview of all the different things we're doing with our digital strategy.

Michelle Parker:

Here's the link to the strategy itself, and then if you want to contact us, we have a group email box. I'm sorry I didn't say. I'm located in the Center for Digital Development in the Global Development Lab. And this is our inbox. It is monitored by a group. That way we don't lose anything. We want to be very responsive and make sure that we're getting back to every single inquiry that we are getting. So that's my quick overview. I wanted to stop here and say, are there any questions?

Justin Prudhomme:

Thank you, Michelle. Again, if anyone does have questions for Michelle, please feel free to type them into the chat box. I did want to raise [inaudible 00:34:01] digital development strategy, at LPA we've heard a few questions that I think come up several times, and I think it may be a starting point... You could just answer some of them here. The first one is: what would you say to people who don't think of themselves as tech people? How would you distill this, and what does it all mean? You might say I'm asking for a friend.

Michelle Parker:

Right. No, I think that's a great question. And again, just to be clear, it's a digital strategy. Not digital development strategy. So, as a non-tech person... Again, I am not a tech person. I've spent the bulk of my career working in crisis and stabilization environments, and actually, a little bit of how I came this is I was recently working in a country where I experienced "doxing." For those of you who don't know what that is, it's where information is taken about an individual, and put online in a kind of threatening way. So, some of the beneficiaries that we were working with, their personal addresses were put online. Their car license plates were put online. And of course, this is a means of intimidation that some folks use when they're targeting human rights activists or independent media in environments that maybe don't favor those.

Michelle Parker:

So I think the idea behind this is that we are already dealing with technology. It's just that it's our responsibility at this point to start to understand what are those implications, because it's going to be facing us more and more. So the answer is, as a non-tech person, you don't have to become an expert, but you do have to start understanding the development implications for this. And again, we're trying to make it easy. You don't need to become an expert on artificial intelligence, right? Artificial intelligence is a super hard concept, or maybe it isn't for everybody, but I didn't understand what it was. But the idea behind it is basically saying we're going to be automating some things that have always been done by hand. So for example, in the justice system, some countries are starting to automate their cases, where they're saying, "Oh, if it's just a basic speeding ticket, do I really need to spend a lot of time on it? So I'm going to create a code. I'm going to create a program that basically looks through all this and says, 'Oh, this basically looks like a speeding ticket. They get a $50 fine and we'll automate all of that.'"

Michelle Parker:

Well, that's a very simplistic and non-high-stakes way to use AI. What if it's being used in criminal procedures in the justice sector? We've actually had this request from a country, to help implement AI, again, artificial intelligence, into their criminal justice system. Well then, we kind of need to understand what are those implications, because once that code is written, it integrates biases. It integrates existing tensions in a society if it's not done in an inclusive manner. So for that, we partnered with MIT and we recently came out with guidance on how to use artificial intelligence and development programming to ensure inclusion.

Michelle Parker:

So for example, we have these tools available, and I would just say it's a little scary, but once you kind of get into it, it makes a lot of sense, and especially for the DRG space. There's so many implications for inclusion and rights that we really need to be forward-leaning in this. So I hope that helped and didn't scare anyone, going into AI right away.

Justin Prudhomme:

Building off of that, are there some concrete ways for people to learn more about digital tools that you [crosstalk 00:37:43]-

Michelle Parker:

That's an excellent question. Yeah, so here's something really concrete and easy every single one on this fantastic list can do is in routine meetings, assign each team member to go in to do a little research on a topic. What is 5G? What is AI? Okay, I'm going to say probably avoid blockchain. That one's a little complicated. I'm still trying to wrap my head around it. But if you can do very... Some concrete things of what... Well, I guess you guys know social media better than most, but what is data scraping? Have someone in your team go watch The Great Hack, and then report back on it. And maybe in a weekly meeting, or once a month, just have them explain, what is the concept of 5G. And again, we understand, you all aren't going to become experts on this, but the idea is at least one person on the team starts learning about each technology and then shares it. It's very concrete, and again, we can provide a lot resources from USAID, although ours can be very dense and kind of think tank-y. There's probably a great YouTube video that you can watch for three minutes and learn more about it than a dense USAID product. So we have those available.

Michelle Parker:

So for example, after this I can share with my colleagues we have information on digital ID, on blockchain for financial technology. We have some of these tools available, and we'll be building them out. But again, concretely, go assign everyone in your team to just research. Go watch a YouTube video on what is 5G and why does it matter. And that's the easiest way to do it.

Justin Prudhomme:

Okay, great. That's a good suggestion. A question came in. Will this mean there will also be adaptation or recognition of heavier initial investments in project budgeting for adaptations tech infrastructure with partners in country?

Michelle Parker:

Adaptation or recognition of heavier investments in project budgeting? I'm not sure if the question is referring to when partners are designing a project, if they need to increase budgets for the technologies built in, or if you're talking about as implementing partners that need to adhere to certain cybersecurity and data privacy standards in your budget for operations, but I think on both sides, I would say yes. There needs to be a focus on budgeting for technology. Now, one of the things I think is really important to understand is that technology is a set of tools that will help get you to your development solution. In this strategy, we're not recommending just introducing technology for technology's sake. Again, that's the whole idea of analyzing the opportunity versus risk. But there might be digital solutions that actually can lower budget costs if they're invested in the beginning of a project. So I don't have any concrete examples, and I'm not sure I fully answered that question, but the idea behind it is that yes, this is the kind of thing that should be budgeted out. And going back to the principles for digital development, we would ask that you use open source whenever possible.

Michelle Parker:

So for example, I was recently in a country where I managed an office, and we had about 16 different digital tools and technologies that were being used, and they were all bespoke. They were all created just for that program. So in five years' time, or in two years, when the project ended, that system just went away. We weren't able to hand it over to a local organization to then maintain it. We couldn't find the guy in another country who did the code for it. It was a bit of a mess. So part of the principles call for reuse, recycle, and use open source. So that would be one example. And maybe we could do a partnership with a tech company to look at getting those as discounted prices. So there's lot of ways we can work around some of the budget challenges. The next question-

Justin Prudhomme:

Right. Great there's another related question about... To what degree do you have to mainstream the policy as well as on the applied side.

Michelle Parker:

The policy? Sorry. I don't think I understand the question.

Justin Prudhomme:

In other words, to what degree do you envision mainstreaming across technical and regional bureau operations as you mainstream the policy? So-

Michelle Parker:

Yeah. In absolutely everything. So, one of the initiatives under that first track of building out ecosystems is a call for every technical sector and every regional bureau to develop ... We're calling them visions, but they could just be a series of guidance around how digital should be used in those spaces. The strategy could only be about 30 pages, so we couldn't dive deep into the specific needs of every single sector. So what we're asking for... Like in this case, we're working with David Black and our colleagues in the DRG Center to really look at what would be a set of guidance or vision statements for the DRG sector look like for digital... Again, using the framing of the strategy. So we're integrating it throughout everything that we are doing. In fact, we're getting an ADS chapter on digital, so we will be able to develop more specific... Yeah that was- for those of you inside AID, you know how big of a deal that is... To develop more specific guidance, and it will go even to the mission level where we're talking about working on mission orders for digital. So this will be fully integrated. But I want to just caveat.

Michelle Parker:

We launched the strategy six weeks ago, and it's a five-year strategy. So you're stuck with me for a while, but also, we're going to be slowly rolling out different aspects of this.

Justin Prudhomme:

Great. Thanks. I do want to be cognizant of time and keep everything on schedule. I do want to point out, if we haven't answered a question here, or there's further clarification needed, we can always do that at a later date through the Center for Excellence on Democracy, Human Rights, and Governance. But for right now, I just want to say thanks, Michelle. That was a really interesting presentation, and some really great answers.

Michelle Parker:

Great. Yeah, and I may not have answered all of Lewis' question. I'm happy to follow up and provide additional answers later.

Justin Prudhomme:

Great.

Michelle Parker:

Thank you again for having me.

Justin Prudhomme:

Our last presentation today is going to be a branding and marking update to the ADS chapter 320, which I know is vital to everyone working with USAID, near and dear to my heart, being at LPA. And here to present that is Jane Bilcock. Jane is the Senior Advisor for Brand Management at USAID bureau for Legislative and Public Affairs. In this role, Jane is responsible for overseeing the agency's external and internal branding and marking policy. Hello, Jane.

Jane Bilcock:

Good morning, everyone. Thank you for having me. Thank you, Justin, for the introduction. I think this is about the fourth year... Maybe the fifth year that I've participated in these DG partner meetings. I just want to thank Jessica... I think they're really phenomenal and a great example of what we really should be doing across all of our various technical areas. I know the DG partner community is really strong, and I just really appreciate being able to be here today. So thank you.

Jane Bilcock:

If you all take a look down at your chat box, we're going to have a link there go live in just a second. I hope we'll have time to watch the video today, maybe at the end, but I would really encourage you... I know it's a Friday, so happy Friday, everyone... After my presentation to pull that up. About a month ago, an at-home video workout from the 80s went viral. This is a phenomenal video, mostly because it prominently features USAID's brand. So encourage you all to take a look at that, share that. It definitely violates a number of our branding and marking policies, but that's okay. We can have some fun. It's only two and a half minutes. Encourage you all to get up out of your chairs and do the video, and celebrate USAID's brand.

Jane Bilcock:

So as I begin, just quickly in this presentation, I am going to go over USAID's brand equity, how we effectively implement USAID's branding and marking policies, and in particular as you've heard mentioned, I'm going to talk about some updates to the ADS chapter 320 that were released in February.

Jane Bilcock:

Before we go into USAID's branding, it's important for us all just to remind ourselves why brands matter. A brand is defined really as a perception, an intangible sum of attributes, or a gut feeling that someone has towards a product, or company, or organization. We know that when people have a positive perception towards a brand, they trust it, and when they trust it, they become loyal to it. We can all think about why companies easily want their audiences to trust and have a positive perception and

become loyal to their products. Obviously Coca Cola wants people to buy their products, buy their Coke. For USAID, we want people to have a positive perception, to trust us, and then to also become loyal to us for a number of reasons. If we were in person, I would crowdsource the room and ask you all to reflect on that, because we truly all can think of a variety of reasons why that matters. But primarily, it's because it helps meet the foreign policy objectives of the United States. It's why branding and marking is actually included in federal law.

Jane Bilcock:

It's part of the 1961 Foreign Assistance Act that we're required to brand our programs overseas as from the American people. We also know that when our key stakeholders become to loyal to us, that enables us to operate in the countries that we work, and enables you all to execute the good work that you're doing. And then it also helps us forge new partnerships. Those are just a few reasons, but there are a number of reasons why really executing our branding and marking in an effective manner is positive and important.

Jane Bilcock:

I love this slide. I love taking a little bit of history, and I have no idea why our logo on the bottom right hand corner is incorrect, but that is to show you what we are not supposed to do. I think when we downloaded this and converted it to an old version of PowerPoint, that must've happened, or maybe it's the Adobe system. Anyways, that is what you should not do here. The perfect example. If you look over time, our brand dates back over 60 years. At the top left hand corner is the first identity if the US Foreign Assistance, during the Marshall Plan. You go to the next. That was in 1953, the Mutual Security Agency, which is one of USAID's predecessor agencies, first introduced the iconic hand clasp that we all know and love to date as a part of USAID's identity. That hand clasp is a universal symbol of friendship and mutual benefits. You go through the years.

Jane Bilcock:

The upper right hand corner... In the early 90s, I think some people... Actually, one of my colleagues in LPA was here at the time when that was developed and helped develop that logo, but they decided to go a little rogue, tried to be a little edgy at the time, quickly realizing that brands take many years to develop, and to build brand equity, you need to be consistent. Brands can evolve over time, but drastic shifts can totally disregard the brand equity that's built. So quickly reverted back to the similar elements of the old identity. Then if you go over to the bottom right hand corner is our USAID identity that is what we currently use today. This was launched in 2004, 2005. You can see that it was after a lot of focus group testing and research that this identity was created. It includes the brand name, which is introduced as USAID, USAID, the agency seal, and then our tagline, "From the American People." So it made clear that this assistance is from the United States.

Jane Bilcock:

So if you think about it, really, the US government has invested millions of dollars over decades to help build the USAID brand, and it has proven successful. And when I talk about USAID's brand, it's not just our corporate brand, but really our brand reflects all the work that our partners are doing, and in order to build our brand, it would not be possible without all the work you all are doing, all the communications you all execute, as well as all the communications that your projects execute. And of course, you all know about branding and marking plans and the nuances that are involved there, but

effectively implementing those plans really helps build our collective USAID brand that we all should be very proud of.

Jane Bilcock:

We know that branding and marking works. It does help meet our foreign policy objectives. We've seen time and time again across many countries there's been surveys conducted that show that people... After there's a significant amount of USAID-branded assistance that people have a positive perception towards the United States. So really, the USAID hand clasp has become one of... I mean, I think... One of the best known US emblems throughout the world. It sounds a little cheesy, but it really is true, and I think we all should be very proud of that when we see that.

Jane Bilcock:

So now to the nitty gritty details of our ADS 320 that you heard in the previous presentation, how really in the agency it is a big deal to change an ADS. Our ADS chapters govern our policy. And branding, again, I mentioned it is required by law. It's also required by federal regulation. We're the only foreign assistance agency that's required by regulation to brand and mark our programs. And then we have our ADS policy objective, our policy that expands upon the law and the regulation to give more guidance to our partners.

Jane Bilcock:

So if you don't remember anything out of this presentation except for one thing when it comes to branding and marking, is that branding and marking always comes down to funding. I know there's a number of people on this call that have significant experience with USAID branding. There's some that this might be new. So the next few slides, I talk about our policies. I'll try to introduce some new things for those of you that are veterans and could be up here with me educating others on our branding and marking policy, and then I'm also happy to take questions for those of you that are a little less familiar at the end. So we know that acquisition instruments, which in our contract are... USAID procures all of the products and the services that is in those. So no co-branding or co-marking is allowed with a partner. You must follow USAID graphic standards completely so it appears that it's 100% USAID. For assistance mechanisms, cooperative agreement, of course we want to showcase that partnership. USAID is not the only funder of those activities. So co-branding and co-marking is allowed and preferred. You can see in our USAID graphic standards manual... You can find that at USAID.gov/branding outlines all the nuances of co-branding and how it works and what makes sense. Doesn't require you to use Gill Sans, the same typeface or the color.

Jane Bilcock:

And then partnerships. When there's all kinds of new mechanisms the agency is looking at, whether it be public/private partnerships, or even some of our older mechanisms with bilateral agreements, we also use co-branding and co-marking. It's important to remember that there is a difference between branding and marking and what that difference is. Brand or branding is really the full system of activities than an organization uses to help communicate its perception. So that can include everything from the messaging, the tone, the color, the PR and communications activities, but also the look, the feel, the colors, the actual visual identity and the logo. Marking refers to just the physical application of the visual identity and the logo.

Jane Bilcock:

The updates to ADS 320... I hope everyone has read ADS 320 in its entirety. Some lovely light reading, about 50, 60 pages. It's a great time right now in quarantine to sit down with a cup of coffee and go through it, so I encourage you all to do that. You'll note that the chapter was updated in February. Normally when we do updates, parts of it are highlighted so you can see the difference between the old one. This is a complete revision. But really, the main changes... As you all read through it and remind yourself of the policy, there are three main changes. One was to our waiver process. So there are times when we do not want to mark our program overseas with the USAID identity. Does not make sense. And the justifications for those times come down to waivers or exceptions.

Jane Bilcock:

So waivers are for compelling political safety or security concerns. They are emergency reasons to not mark our programs. They happen quickly, and there's now new process that... It doesn't affect you all necessarily. You could potentially be involved in helping draft a justification for a waiver. I'm not sure if any of you all would do that in your jobs if you work more on the projects side, but essentially, there's a new template [inaudible 00:55:09] with a new criteria and requirements. This really came after former administrator Mark Green did a number of site visits and saw that there was not a clear process to how waivers were being administered. Many were out of date, and years old, and no one was taking the time to go back and revisit and really think judiciously of what makes sense if we should be marking our programs or not.

Jane Bilcock:

Of course, safety and security is of the utmost concern, and the agency's policy is to err on the side of safety. If there's multiple considerations to look at, we're going to err on the side of safety. We want to protect human life and property. However, in general, our administrator and our current acting administrator have both said that we really need to make sure that we're getting the most on-the-ground, detailed security information as possible and being very judicious of making a decision of whether or not it makes senses to mark our programs.

Jane Bilcock:

So second exceptions... The process did not really change much in the new ADS. There's some more internal processes with approvals, but it wouldn't really affect you all. It's just important to note that there are eight different reasons. These are routine, programmatic reasons to not mark our program. That could be it would impair the functionality of an item, for example. I don't know if any of you all saw on the news that we have been sending ventilators overseas to some of our partner countries, and the boxes and things like that were able to be marked, but the actual ventilators themselves... Because they were going to ICU's, the company said it would make them not sterile, so those were not marked. And that's an example of a programmatic exception.

Jane Bilcock:

So next, we have a monitoring and verification form that's new. You can see that in the mandatory reference documents in the ADS. This form will be used by CORs and AORs, potentially communication staff, and others in the agency to monitor projects and make sure that projects are executing upon their branding strategy and branding and marking plans. It's important to note that we do get audited. Projects do get audited for branding and marking. There's actually a global audit that kicked off on May first that's going to a number of countries and looking over our projects right now. So the Hill cares about it, the IG cares about it. It's the law, so it's important that we're really following our policies. So

again, you all can take a look at that, and know that's what USAID will use to ensure the projects are branding and marking correctly.

Jane Bilcock:

Next, the roles and responsibilities. Again, this is more internal processes, but the most important thing for you all to note is of course your COR, AOR for a specific project is your first point of communication for branding and marking sessions. Jessica Bentonv Coony or whoever the respective bureau or office communicator or doc if it's funding by a mission overseas would be the main point of contact if that COR needs extra help, technical support on a branding and marking question, and then there are various other roles and responsibilities outlined in the ADS.

Jane Bilcock:

I'm going to skip over ... It's essentially don't recreate our logo. Don't do what the slide did earlier, the historical slide and mess up the graphics and the logo. But essentially, just use the files that are available at our website, USAID.gov/branding.

Jane Bilcock:

Sub-brands are only allowed for missions. You can see here, USAID Jordan is a sub-brand. We ask that our projects do not ever use a sub-brand at their project site. Some brands are really for administrative and corporate materials for the missions to use. For example, on letterhead a Ministry of Health, for example. But really, they should never be used for projects. However, we really do encourage translated taglines to be used in your activity, so make sure you're including those marking plans with the translated tagline will be used. And you can download a number of translations on our web page.

Jane Bilcock:

Project naming. Again, some of you all might be involved, depending upon where the name comes up in the procurement process, but this really is an opportunity to brand our program overseas. We really encourage, if it makes sense, to use the word USAID in the project name. We use the headline test frequently to see if it's a strong project name. So, for example, USAID Media Strengthening Program Empowers Journalists in Cambodia would be a strong project name.

Jane Bilcock:

Let's quickly pop through this quiz, and then we'll have just a few minutes for questions. But you can think to yourselves if this is right or wrong. Is this right or wrong? And while we're doing the quiz, feel free to ask some questions.

Jane Bilcock:

That is wrong. No sub-brands are allowed to be created, except for USAID missions.

Jane Bilcock:

Is this right or wrong? Usually people laugh here, so I'll pretend that I can hear you all laughing. Of course, this is wrong. This would be an example of an exception or what could they do here? This is a dam in Afghanistan. They could've put up a billboard on the side.

Jane Bilcock:

Right or wrong? This is wrong. We don't ever want to get cute with our brand. It's important to honor, respect our brand and really help maintain that brand equity. We don't ever want to alter it or get creative with it.

Jane Bilcock:

Is this right or wrong? It's wrong. Of course. You get the trend here.

Jane Bilcock:

This is not a USAID project, but I love this example that my colleague Cecilia shared with me, that I think it was Somalia... Yeah, Somalia mission shared. So again, be realistic in what needs to be marked and what does not. This should be natural. That is not natural.

Jane Bilcock:

So any resources for branding if you have any questions, ISAID.gov/branding is your one-stop shop for a number... For the ADS policy, our graphic standards manual, an FAQ sheet, a number of other products and pieces that are hopefully helpful to you. And with that, I am happy to take some questions. Thank you.

Justin Prudhomme:

Thank you, Jane. Interesting as always. I do think we're going to take an opportunity to watch that video that you suggested. I didn't know if you wanted to key it up at all, and then we'll turn it over to Soojin, who will explain how people can get to the video.

Jane Bilcock:

Yeah, and I think ... Just what I mentioned in the beginning, it's fun, it's about two and a half minutes so it's a great opportunity to stand up and follow along if you want to take a little break. And then we'll come back here for questions for Jane.

Soojin Ku:

Great. Thank you. In just a moment, you'll see your screen shift, and you'll be taken to a new web browser with the video. Please click play when you arrive to the new stream. After you finish watching the video, please redirect your web browser to this aid connect page. And with that, enjoy the video.

Speaker 8:

(silence)

Justin Prudhomme:

So hopefully everyone has been to watch that, or is finishing up. I think we can all agree that's probably not okay branding. But no equipment needed, and it's workout you can do at home during this time of social distancing. Okay. So now is an opportunity for everybody to ask questions for Jane on branding and marking. I guess I'll kick it off with a question that I see all of the time, and one that was brought to me frequently when I was a doc in the field. What about creating project logos, or logos for projects?

Justin Prudhomme:

Jane, I think you're on mute, so if you can just unmute.

Jane Bilcock:

One second. Okay. Sorry about that. Great question. We definitely get that question all the time and definitely would like your all support in educating your organizations around this topic, and branding and marking in general. We do have PowerPoint slides as e-modules for partners that's on our branding page that you all could take and use and give a similar presentation to what I've given to your technical staff at your organizations.

Jane Bilcock:

To answer your question, Justin, I would say 99.999% of the time, project logos should not be developed, are not allowed. Technically, they do have to come up to LPA, to me in LPA to approve those logos. But essentially, we see all the time that the justification for a project logo is they want to create a unified identity, and really it's to help market that specific project, and that's not justification for creating a project logo. What it does is it just adds... It takes a lot to build a brand, and when we have projects that only last three or five years, we're spending a lot of resources to build that logo and all those products. It goes away in just a few years. So it's better to not add to the logo soup. We've all seen that a lot of our activities overseas have a million different logos on them. We don't need to add one more that is not recognized to actually make it look like it's a separate entity, a separate NGO. It actually dilutes USAID's brand and if we're co-branding with a partner, if it's a [inaudible 01:07:39] agreement, it dilutes your brand as well.

Jane Bilcock:

So it's really much better. You can still get all the benefits of creating a unique and cohesive communication strategy through our projects. The name itself is what helps identify the project and bring it together, but you don't need to create a logo for it. There are some programmatic reasons why you would want to create a logo, and that's outlined in our graphic standards manual, but essentially, to think that is inherently essential to create a new brand, again, which takes a lot, to meet the programmatic objective. And one way to think about it is, is this brand going to live beyond the life of the project?

Jane Bilcock:

For example, if you're creating an immunization campaign, or a behavior change campaign, of course it might make sense to create a new brand, a new logo, but then the ministry could take over when it's over. I think there was another example in... I believe it was Kenya... It was a security company that was hired to protect... I don't know if it was Kenya or not... But to protect some of our partners and be used for that purpose. And it made sense then that the security company have their own identity to appear as independent and separate. So there are specific programmatic reasons, but again, just try to minimize those requests as much as possible and then if they do come up, to work with your COR to gain approval.

Justin Prudhomme:

We will do one more question that we received in advance. I want to create a video of my USAID-supported project. Am I allowed to brand it with the USAID bumper, and who needs to clear on that?

Jane Bilcock:

Yes, you are. So we definitely should be using... For all of our products... Using USAID's brand or USAID's logo. So yes, you are allowed to use that for project videos. It depends. The level of clearance would depend... Always sort of your COR and AOR. It should be outlined in your branding/marking plan. For most projects' products, it would just be your COR that would clear it. Most likely, they would also share it with their respective communicators, the doc, or the bureau communicator, [inaudible 01:10:01] Washington for clearance. If they're meant to go at a global level on USAID's main platform, and out at the global level, then that's when it would come up to LPA for clearance. But most of the time, projects, products, of course can be cleared by your COR.

Justin Prudhomme:

Great. Thank you, Jane. And that rounds out today's session. So if there are any... If there are any other questions, please feel free to reach out to your point of contact as USAID and we'll get you those answers. I want to thank our presenters for today, and I want to wish everyone a happy Friday, and a good weekend. Over to you, Soojin.