

# CAFII Media Protocol II

## June 2017

### Background

CAFII has an existing Media Protocol, entitled “CAFII Media Protocol,” -- to be called “Media Protocol I” for the purposes of this document -- which was updated in March 2017 and approved at the April 5, 2017 Board meeting. This Media Protocol I details the process by which CAFII will respond to media requests.

The CAFII Board has noted that the process to respond to media requests is consensus-based and potentially time-consuming; and has therefore recommended that a streamlined approach would increase the probability of CAFII effectively responding to media in specific circumstances. More specifically, it was noted that negative columns/articles in print media could be countered by a Letter to the Editor, but this requires a rapid (typically same day) response. It was proposed that as part of a proactive, not reactive media strategy, a first step for CAFII would be to develop a rapid response to negative media columns/articles where a same or next day Letter to the Editor could provide a counter point of view. This will be called Media Protocol II.

### Strategic Objectives and Tactical Considerations

There has been a vibrant and useful discussion among senior CAFII leaders about how best to respond to negative print media columns/articles. On the one hand, there have been examples of erroneous, unfair, and inaccurate columns/articles to which CAFII could, but has not, set the record straight. On the other hand, the impact of these columns/articles on public perception is not clear: responding could keep the issue in the public eye, and elicit further negative commentary--for example from the active and well-organized broker lobby.

Is it best to respond and set the record straight? Or to take our lumps and let sleeping dogs lie, letting our customers make their own judgments based on CAFII members’ strong and proven record? Or do we best respond more indirectly, by making our case through networking with influencers; through our website where we can share a controlled message in our own environment; and through research where we can disseminate the facts objectively and methodically.

To move forward the potential for responding quickly to negative print media columns/articles with a Letter to the Editor as part of the tactical toolkit in our media strategy, the Board has directed staff to develop a rapid-response approach—Media Protocol II.

## **Media Protocol II—The Preparatory Process**

### **Step I – Preparation**

The Media Spokesperson for CAFII (Co-Executive Director KMartin), in consultation with Co-Executive Director of BWycks, and in close collaboration with the Media Consultant (DMoorcroft), will develop a set of Letters to the Editor (likely eight in total), which can serve as pre-approved responses to probable and typical negative print media columns/articles. These will differ slightly in content and tone, in anticipation of how best to respond to different types of negative columns/articles.

### **Step II—Article Approval and Pre-Approval**

The CAFII Board will make any desired changes to the Letters to the Editor, including eliminating any or requesting additional ones for development with a new, different, and specified content and tone. The final drafts will be approved by the Board and then serve as a pre-approved set available for responding to negative print media columns/articles.

### **Step III—The People and Process Involved in the Decision to Send a Letter to the Editor**

The CAFII Board will review and approve, up-front, the following: the process for sending a Letter to the Editor including the people to be involved; and the set of Letters to the Editor to be used to respond to a negative column/article. The process to be followed in actually responding to a negative media column/article will be a streamlined one.

## **Media Protocol II**

The proposed people to be involved and the proposed process are as follows:

### **The People**

Media Spokesperson:	Co-Executive Director (KMartin)
Proposal to Respond to Media:	Any Board or EOC member, or staff, or the Media Consultant
Staff Initiators:	Co-Executive Directors (KMartin and BWycks)
Media Consultant:	Media Consultant (DMoorcroft)
Leadership Deciders:	Board Chair or designate (currently PMcCarthy) EOC Chair or designate (currently EFang)

### **The Process**

#### **Action I:**

Identifying a Situation Which Warrants a CAFII Response: any Board or EOC member can bring a specific article to the attention of one of the co-Executive Directors (KMartin and BWycks) to initiate the process.

#### **Action II:**

Recommendation (yes or no) with rationale: Co-Executive Directors (KMartin, with BWycks)—to be brought to Leadership Deciders. Yes or No decision is made by Leadership Deciders. If decision is no, file is closed. **If decision is yes, proceed to Action III.**

#### **Action III:**

Media Spokesperson to consult with Media Consultant on the following:

- Is there an appropriate pre-approved Letter to the Editor available, and if so which of the pre-approved Letters to the Editor is to be used?
- What tweaks/modest changes (if any) are to be made to the pre-approved Letter to the Editor?

#### **Action IV:**

The chosen Letter to the Editor, slightly modified as required, is sent for publication under the CAFII Board Chair's signature. Notice is sent to the EOC and Board. The EOC and Board is kept up to date on subsequent developments.