Communications and Media Protocols
As of December 2021

Charles and Lynn Schusterman Family Philanthropies recognizes that effectively communicating to stakeholders and the media is integral to our work. Our Communications Protocols provide guidelines that help ensure our public-facing communications are coordinated, consistent and reflective of our values.

The Communications Protocols cover:

- **Brand guidelines:** High-level language and brand guidance, including how to use the Schusterman name in public-facing settings (detailed guidelines can be found in our Brand Book);

- **Review and approval processes for external communications:** General protocols related to communications processes and engagement with media.

Our protocols work in partnership with our IT General Controls, Code of Conduct, and Internet and Social Media policies. They apply to all public-facing language and materials and should be adhered to without exception, unless approved by a member of the Executive Team or the Chief Communications Officer.

Our protocols are maintained and updated as needed by the Communications Team. You can find the latest version in the Communications SharePoint folder.

Brand Guidelines: Public Deployment of Schusterman Family Philanthropies

In January 2021, we began using Charles and Lynn Schusterman Family Philanthropies as our primary public-facing name to enable us to use the full scope of our grantmaking, operating and advocacy work to advance our values and issues in the public sphere. In Israel, we use the name Charles and Lynn Schusterman Family Philanthropies – Israel. The following protocols should guide public use of the Schusterman Family Philanthropies name and how we discuss our work.

1. It is important to remember that:

- In the U.S., Schusterman Family Philanthropies is a brand name, not a legal or employment entity.

- In Israel, (ע"ר) ישראל – קרן שוסטרמן will be used together with Schusterman Family Philanthropies – Israel.

2. Charles and Lynn Schusterman Family Philanthropies is our public-facing brand in the U.S. and **Charles and Lynn Schusterman Family Philanthropies – Israel** in Israel (when referenced in English).

- After first reference, "Schusterman Family Philanthropies", "Schusterman Family Philanthropies – Israel" and "Schusterman" can be used as the simplified, less formal name in speaking and writing.

- The acronyms CLSFP and SFP can be used for underlined internal purposes only.

- Our name does not take a formal "The" and always spell out "and".

    o Correct: Charles and Lynn Schusterman Family Philanthropies

    o Incorrect: The Charles and Lynn Schusterman Family Philanthropies

    o Incorrect: Charles & Lynn Schusterman Family Philanthropies

- While there are instances where Schusterman Family Foundation may be used (for example, on grant agreements), you should not use these names on public-facing materials without approval from Legal and/or Communications.

3. In the U.S., Schusterman Family Philanthropies is not considered a Foundation and therefore, you should NOT refer to the organization, verbally or in writing, as a Foundation.

- You can use: organization, Schusterman Family Philanthropies or SFP (internally).

- In Israel, we still use the Hebrew word קרן to describe our organization.

4. Mission Statement

- We use our official mission statement as our boilerplate language on all of our materials.

  o Charles and Lynn Schusterman Family Philanthropies strives for a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies. We work to advance racial, gender and economic equity in the U.S., as well as to foster a more joyful and diverse Jewish community. In Israel, we work toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable. We aim to drive and support long-term systemic change through investments in leaders, organizations and U.S. public policy. www.schusterman.org

- We have a shortened version of our mission statement that we provide to grantees for use on their materials.

  o *U.S.:* Charles and Lynn Schusterman Family Philanthropies strives for a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies. Schusterman invests in efforts to advance racial, gender and economic equity in the U.S., as well as to strengthen the Jewish community and Israel. We aim to drive and support long-term systemic change through investments in leaders, organizations and U.S. public policy. www.schusterman.org

  o *Israel:* Charles and Lynn Schusterman Family Philanthropies strives for a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies. In Israel, Schusterman Family Philanthropies – Israel works toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable. www.schusterman.org

- All materials should use this language verbatim unless you have received written approval to provide alternative language.

5. Brief Description

- If asked for a brief description of how we are structured, you can use the following:

  o Schusterman Family Philanthropies uses grantmaking, program and advocacy activities to advance our mission. In the U.S., Schusterman Family Philanthropies includes the charitable grantmaking and programmatic work of the Charles and Lynn Schusterman Family Foundation, as well as the advocacy activities supported by the Schusterman family. In Israel, our grantmaking activities are funded through the Schusterman Family Philanthropies – Israel (קרן שוסטרמן – ישראל (ע"ר)) and our program activities are funded through ROI Community.

6. Key points that can be used to describe our work:

- Schusterman Family Philanthropies invests in long-term systemic change in the United States and Israel. We strive for a future in which both countries live up to their highest ideals and achieve more just and inclusive societies.

- In the U.S., we invest in efforts to address systemic racial, gender and economic inequities through our work in Criminal Justice, Education, Gender and Reproductive Equity, Voting Rights and in the Schusterman family's hometown of Tulsa, OK.

- We are committed to building a joyful Jewish community that lives out Jewish values, fosters a sense of belonging amongst diverse Jews, strengthens support for Israel and contributes to a more just world.

- In Israel, we work toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable.

- We seek to put our commitment to diversity, equity and inclusion—particularly as it relates to race, gender, sexual orientation, gender identity, socioeconomic status and citizenship status—at the center of our work in the U.S. Within our Jewish, Israel and Tulsa portfolios, we have long invested in efforts to pursue LGBTQ equality and belonging.

- We use grantmaking, program and advocacy strategies to invest in our seven portfolios: Criminal Justice, Education, Gender and Reproductive Equity, Israel, Jewish Community, Voting Rights and support for our founders' hometown of Tulsa, OK.

- Our grantmaking activities include investments in charitable and educational organizations within our seven portfolios.

- We also operate three programs focused on cultivating leaders as well as their commitment to justice and connection to Israel: REALITY, ROI Community and the Schusterman Fellowship.

- Our newer advocacy activities in the U.S. are focused on supporting policies, legislation and, at times, elected officials who share our commitment to ensuring people have equitable access to resources and opportunities, as well as to ensuring the strength of the special bipartisan relationship between the U.S. and Israel.

- Our philanthropic approach includes a commitment to ongoing learning, long-term investment, and supporting a range of partners working on long-term solutions in our portfolio areas.

- In 2021, we updated our name to Charles and Lynn Schusterman Family Philanthropies (Charles and Lynn Schusterman Family Philanthropies – Israel in Israel). This change reflects the continued expansion of grantmaking, operating and advocacy activities funded by the Schusterman family.

- In the U.S., Schusterman Family Philanthropies includes the charitable grantmaking and programmatic work of the Charles and Lynn Schusterman Family Foundation, as well as the advocacy activities supported by the Schusterman family.

- In 2020, the Schusterman family gave $450 million across its charitable and advocacy grantmaking, including over $150 million to COVID-19 emergency relief efforts, primarily supporting low-income individuals across the U.S. and Israel.

- **In the U.S., if asked how Schusterman Family Philanthropies differs from the Schusterman Family Foundation:**

  - Schusterman Family Philanthropies is our collective brand that encompasses all of our grantmaking, program and advocacy activities. Our grantmaking and program activities (classified as 501(c)3 in the United States) are funded through the Schusterman Family Foundation. Our advocacy and political activities (often classified as 501(c)4 in the United States) are funded through other entities supported by the Schusterman family.

- **In Israel, if asked how Schusterman Family Philanthropies differs from the Schusterman Foundation-Israel:**

  - Our name in Hebrew is (ע"ר) ישראל – קרן שוסטרמן. Schusterman Family Philanthropies – Israel is the English translation of our Hebrew name. We changed it to keep it consistent with the name we use in the United States.

7. Our grantmaking portfolios all operate publicly under the Schusterman Family Philanthropies name.

- Our **Criminal Justice** portfolio seeks to build healthy and safe communities by ending mass criminalization and incarceration, repairing the harm caused by a criminal legal system built on structural racism, and creating new pathways to justice and safety.

- Our **Education** portfolio seeks to build an equitable society in which Black and Latinx students from low-income backgrounds are able to access a high-quality, culturally relevant K12 education that empowers them to achieve social and economic liberation.

- Our **Gender and Reproductive Equity** portfolio seeks to build an equitable world in which all people—particularly Black women, women of color, and transgender and nonbinary people—have access to reproductive health care and knowledge, to greater political and economic power and leadership, and to safety in all aspects of their lives.

- Our **Israel** portfolio seeks to strengthen Israel as a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable.

- Our U.S. **Jewish Community** portfolio seeks to strengthen the future of the Jewish community by empowering young people to connect with inclusive Jewish values, deepen their understanding of Israel and contribute to a better world.

- Our **Tulsa** portfolio supports youth and families in Tulsa, OK, who live with the effects of social, racial and economic inequity to gain the agency, knowledge and resources to eliminate systemic barriers and design their own futures.

- Our U.S. **Voting Rights** portfolio supports efforts to enable all citizens of the United States to exercise their constitutional right to vote easily and safely, free from voter suppression, so they can have their voices heard and equitably represented in policymaking.

8. Within our Jewish and Israel portfolios, we operate a suite of programs designed to cultivate and elevate leaders.

- **REALITY** brings a diverse network of inspiring changemakers on a formative journey to Israel to strengthen their leadership and passion for repairing the world as well as to build their understanding of and connection to Israel.

- **ROI Community** is a global network of rising Jewish leaders who are transforming Jewish life and fostering positive social change in Israel, the U.S. and global Jewry.

- **Schusterman Fellowship** is building a robust, diverse talent pipeline of exceptional Jewish leaders who are driving change in their organizations, the Jewish community and beyond.

- Each program operates under its own brand that make an explicit connection to Schusterman Family Philanthropies by including the "A Schusterman Initiative" tagline in their logos and on all official online and offline collateral.

- Messaging and outreach from each program to their participants in and alumni of these initiatives should be disseminated by, and in the name of, each program. Messaging and outreach aimed at the broader Schusterman network should be disseminated by, and in the name of, Schusterman Family Philanthropies.

  o The following language should be used: [PROGRAM] is an initiative of Schusterman Family Philanthropies, which works toward a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies.

  o If space is a consideration: [PROGRAM] is an initiative of Schusterman Family Philanthropies.

- Each initiative's section of the website includes reference to Schusterman on its About page, using approved language. Within the first two paragraphs of official announcements—including press releases and statements— each initiative must identify its connection to Schusterman using the above language.

9. Employees should always list their full titles and organization name in their official biographies when engaged in activities connected to Schusterman and in all public settings, including on social media and when participating in public forums on behalf of the organization.

- When listing your title: Use the version reflected in your offer letter, annual compensation letter and the Schusterman Team Organization Chart.

- When listing your organization:

    o U.S. grantmaking, program and Schusterman Family Management teams: use Charles and Lynn Schusterman Family Philanthropies.

    o Israel grantmaking team: use Charles and Lynn Schusterman Family Philanthropies – Israel, along with קרן שוסטרמן – ישראל (ע"ר).

    o ROI team: use ROI Community, along with קהילת רועי (ע"ר).

10. In all bylined articles and op-eds, as well as during interviews, Schusterman should be mentioned by name and the topic contextualized in the work across Schusterman. For example:

- *This initiative is part of the Charles and Lynn Schusterman Family Philanthropies' Education portfolio, which seeks to build an equitable society in which Black and Latinx students from low-income backgrounds are able to access a high-quality, culturally relevant K12 education that empowers them to achieve social and economic liberation.*

- *This initiative is part of the Charles and Lynn Schusterman Family Philanthropies' broader efforts to advance racial, gender and economic equity through investments in criminal justice, education, gender and reproductive equity, and voting rights.*

Please reference Schusterman brand guidelines for further name and logo usage specifications, available in SharePoint.

Questions about the proper use of Schusterman should be directed to the *Chief Communications Officer*.

General Communications and Media Protocols

The following protocols guide process for messaging and content development, review and approval, as well as media engagement processes.

1. **All media inquiries must be immediately directed to the Chief Communications Officer. Except in extenuating circumstances, the inquiry and any proposed responses (written or verbal) should be approved by the Chief Communications Officer *before* written statements are provided to reporters or interviews take place.**

   - If the Chief Communications Officer is unavailable, approval can be provided by the relevant Executive Team member.

   - When prior notification is not feasible, particularly for inquiries outside of the U.S., the Chief Communications Officer is notified immediately following via email stating the nature of the inquiry, the name and contact information of the reporter and the response from Schusterman.

   - The team member handling the inquiry should also send a follow-up email with the resulting media content to the Chief Communications Officer.

2. **Staff should not speak publicly on behalf of the organization in the media without prior approval. Only designated Schusterman spokespeople speak on the record to the media.**

   - Members of the Board, Executive Team and Senior Directors are designated Schusterman spokespeople.

   - Board and Executive Team can speak on the work and philanthropy of Schusterman broadly. All other designated Schusterman spokespeople speak publicly ONLY on topics related to their portfolio.

   - Staff who come across misrepresentations of Schusterman in the media, by analysts or by other online sources should inform the Chief Communications Officer, who will determine if or how to respond.

   - If a staff member has an opportunity to speak at an event or with the media in a personal capacity, they should not use their organization title or identify as an employee of the organization. If the topic is germane to the organization or its work, then the staff member should clarify that the views presented are their own and not that of the organization. Consider letting the Chief Communications Officer know about the speaking engagement.

   - Any exceptions to these guidelines should be determined on a case-by-case basis and in consultation with the Chief Communications Officer.

3. **Staff should not speak externally on behalf of the organization at events without prior approval. All external speaking engagements on behalf of Schusterman should be shared with the Communications Team for tracking and promotion purposes.**

   - Speaking engagements may include speeches, talking points or Q+A (such as for panels or interviews).

   - Upon request, the Communications Team can draft remarks and provide prep for members of the Board or Executive Team.

   - Upon request, the Communications Team can review talking points and provide prep for Senior Directors.

   - For Communications Team support, requests should be made:

       o Speeches or talking points 10 minutes or more: 4 weeks in advance

       o Speeches or talking points less than ten minutes: 3 weeks in advance

       o Q+A: 2 weeks in advance

4. **Staff should not write publicly on behalf of the organization without prior approval. All content written by a staff member and/or under a staff member's byline for external publication must be approved by the Communications Team before it is published publicly or distributed to the media.**

   - Unless otherwise notified, the Communications Team aims to review and respond within 5-7 days for material that is not time-sensitive and within 48 hours for material that is time sensitive.

       o For major editorial content (i.e., bylined articles and op-eds), the Communications Team requests 10 business days to ensure proper time for review. Exceptions are made when a timely response is critical to advancing Schusterman strategy and interest areas.

   - If a staff member writes an article or blog or signs on to a public letter in their personal capacity, they should not use their organization title or identify as an employee of the organization. If the topic is germane to the organization or its work, then the staff member should clarify that the views presented are their own and not that of the organization. Consider letting the Chief Communications Officer know about the writing or letter.

5. **Staff should not disclose confidential or proprietary information, whether belonging to Schusterman and/or individuals, programs or organizations related to or outside of Schusterman.**

   - Staff should not discuss or reference information that is not yet cleared for public dissemination, such as business plans, finances, program strategies or event details.

- Staff should not make false statements about Schusterman, its employees, programs, partners, associates and/or other third parties. False or malicious postings not only violate Schusterman policy, they may also violate defamation laws.

6. **All usage of the Schusterman logo and name must be in adherence with our logo and name usage guidelines and must be approved by the Communications Team.**

- You can refer to [Brand Guidelines for Grantees and Vendors](#) for a brief overview of permitted and non-permitted usages, as well as an explanation of the process to obtain approval to use our name and logo.

7. **All editorial content and marketing collateral generated by and in the name of Schusterman and its programs must be approved by the Communications Team before it is published publicly or distributed to the media.** *(See Appendix A for list of content requiring approval.)*

- If Schusterman chooses to make a public statement about issues related to our work and/or of local, national or international importance, the official statement will be provided by the Board, Executive Team or Chief Communications Officer.

- The Communications Team does NOT need to review content generated for closed programs and convenings (e.g., bio books, agenda, reading materials) **UNLESS** the content describes Schusterman Family Philanthropies and its work and/or are signed by the Chair or Executive Team member. The Communications Team does review brand-level design work for Schusterman events and programs.

- Unless otherwise notified, the Communications Team aims to review and respond within 5-7 days for material that is not time sensitive and within 48 hours for material that is time sensitive.

  o For major editorial content (i.e., bylined articles and op-eds), the Communications Team requests 10 business days to ensure proper time for review. Exceptions are made when a timely response is critical to advancing Schusterman strategy and interest areas.

8. **The Communications Team provides direct editorial support for members of the Board and Executive Team.**
- All content with the signature/byline of any member of the Board and/or Executive Team MUST be approved by the Chief Communications Officer without exception.

- A written request at least 10 business days in advance is required for content with the signature/byline of the Board and Executive Team. The request should include an outline of what needs to be covered and the context in which it will be delivered. Exceptions are made in circumstances where a quick response is critical to advancing Schusterman strategy and interest areas.

9. **All Schusterman outreach emails—including newsletters, event emails, etc.—must be sent through Marketing Cloud. All social media channels—including Facebook, Twitter, LinkedIn, Instagram, etc.—must operate through Khoros.**

   - Any exceptions to these guidelines should be determined on a case-by-case basis and in consultation with a member of the Communications Team.

10. **Consultants, including public relations firms, are informed of media policies and coordinate with the Chief Communications Officer on any proactive efforts made on behalf of Schusterman and its entities/initiatives.**

See Schusterman Family Philanthropies' Internet and Social Media policy for additional considerations that relate directly to digital engagement. Questions about these protocols should be directed to the Chief Communications Officer.

Appendix A: Content Types

The following types of content require approval from the Communications Team:

- All Schusterman Family Philanthropies' content including:

  - o Board and Executive communications;

  - o Staff bylined articles and op-eds;

  - o Speeches and talking points;

  - o Public statements (written or verbal); and

  - o Press releases/announcements.

- Schusterman Family Philanthropies' emails and newsletters

- Content generated in the event of a crisis

- All content for Schusterman.org and organization social media channels

- Schusterman marketing collateral, promotions and ads, including brochures, pamphlets and swag

The following types of content requires approval ONLY from the appropriate Program Lead:

- Content generated for program-specific gatherings—i.e., bio books, logistics emails, social media posts, etc

- Content for program sections of the website (EXCEPT content describing Schusterman that isn't our pre-approved text)

- Swag generated for program-specific gatherings