



## Standard Operating Procedures | Public Affairs

Updated April 2023



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## Overview

Hello! This document outlines guiding principles, samples, and detailed procedures that drive external engagements with the intent to minimize risk and maximize reward.

## Purpose

To provide Water.org and WaterEquity team with the current procedures used to execute external engagements.

Below you will find outlines per topic section:

<b>MEDIA</b> Bought Owned Earned	<b>CONFERENCES &amp; EVENTS</b>	<b>ASSET USE</b> Org Co-Founder
<b>AGREEMENTS</b> Terms of Reference Fee/donation Sample contract	<b>RISK</b>	<b>ENGAGING CO-FOUNDERS</b>

## Each section includes the following:

- Description
- Guiding principle
- PARIS\* (see table below)
- Process
- Players
- Dos & Don'ts
- Extras

**PARIS**, a responsibility assignment matrix with roles defined as:

Participant	Accountable	Review required	Input required	Sign-off required
Performs the activity	Answer for the correct and thorough completion of the activity, and often the one who delegates the work to a project lead	Accountable for providing guidance based on functional expertise and experience, highlighting issues, and raising alternatives	Provides all relevant information and facts to make the best decision	Makes the final decision, committing the team to action and ensuring the task gets implemented

## Media – internet, broadcast, printed

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This section covers **bought** (paid for content), **owned** (newsletter, website, social channels, podcast), and **earned** (coverage given, often by journalist or news platform).

### Bought

#### *Description*

Bought (or paid) media is defined as the purchase of ad inventory on a media channel or publisher site to broadcast your brand message and reach your target audiences. It is a form of digital advertising that includes sponsored content to promote a brand's products or services. It can also include promotion on social platforms like LinkedIn.

Media companies separate marketing and news. The marketing side will sell content opportunities. The news side will only provide earned media. We have control over what we buy, we have no control over what we earn by offering our team members as subject matter experts to news organizations.

There is a general rule that one should spend 2-5% of their revenue on marketing and advertising.

Public Affairs uses earned media only and does not have a strategy or budget for bought media.

### Owned

#### *Description*

Owned media refers to any online property under the direct control of the organizations, such as a website, social media profile, app, newsletter etc.

At Water.org, the Marketing team is responsible and accountable for the owned media strategy. This includes determining and creating content, campaigns, and schedules for posting/publishing. Please contact the Director of Marketing to learn more about the marketing strategy and content calendar.

At WaterEquity, the Communications Director is responsible for and accountable for the owned media strategy. This includes determining and creating content, campaigns, and schedules for posting/publishing. Please contact the Communications Director to learn more about the marketing strategy and content calendar.

### Earned Media

#### *Description*

Currently, the Public Affairs Senior Advisor is primarily responsible for strategizing, pitching, managing, and vetting all earned media opportunities using a calendar of key dates, global events, and opportunistically as cofounders become available.

#### *Guiding principle*

Media engagements provide opportunities for our subject matter experts to promote Water.org and WaterEquity missions, brands, and raise awareness of the global water crisis, while attracting attention from key audiences.

**Note: As of FY22, neither organization is offering MD for earned or bought media.**

#### PARIS

Participant	Accountable	Review required	Input required	Sign-off required
Matt	CEO	Chief of Staff Matt's publicist and/or agent	Strategic Development WaterEquity	C-level executive of the respective area Chief of Staff

Gary	CEO	Chief of Staff	Strategic Development WaterEquity	Chief of Staff
Senior leader	Senior leader	Situational	Situational	

#### Process

Public affairs will assess and make a recommendation for participation. If Public Affairs originates, it provides rationale to the reviewer.	OCEO approves opportunity for Co-founders and informs Viewpoint LA	Public affairs confirm participation, executes the engagement, and manages all follow up.
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#### Players

Players	Public Affairs	Beltway Media	Internal parties	OCEO	Viewpoint LA
<b>Point of Contact</b>	Senior Advisor	Ali Boneval	varies	Chief of Staff	Jennifer Allen
<b>Role</b>	Manage media requests/pitching	Media Consultant	Relationship expert	Cofounders' relationship manager	Matt's publicist
<b>Responsibility</b>	Pitch/assess Identify subject matter expert Consult internal parties Manage participation	Assesses value, provides sources, and links to previous works, and provides red flag notification	Create key messages	Co-founders Decision maker	Provide input on Matt's media appearances if needed
<b>How/when to engage</b>	All incoming media requests are directed to Senior Advisor	As needed, before engaging OCEO	After participation is green lit	Once thoroughly assessed and determined to be of sufficient value.	Last step before confirming with external party if MD involved
<b>Tools</b>	<a href="#">Cofounder assessment tool</a>		Key message <a href="#">inventory</a>	Brief <a href="#">template</a>	

#### Dos & Don'ts

<b>Earned media</b>	<b>Dos/OK</b>	<b>Don'ts/Not OK</b>
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<p>Discuss topics in advance with booker/journalist.</p> <p>Provide background material to guide the interviewer.</p> <p>Perform thorough reputation assessment including viewing recent interviews.</p> <p>Vet the interviewers with Viewpoint if MD involved</p> <p>Provide assets to support our message</p> <p>Connect to a key date, event, or announcement.</p> <p>Discuss social posts; content, timing, and platform. Determine if release is required</p> <p>Be mindful of our values around diversity. Offer a subject matter expert that has lived experience whenever possible.</p>	<p>Do not schedule interviews with political platforms.</p> <p>Do not schedule interviews with gotcha journalists.</p> <p>Do not commit anyone without explicit approval.</p> <p>Do not leave a subject matter expert without support; background, content, messaging, and pivots.</p>
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#### *Extras*

Media contact list | [link](#)

Sample pitches, below

#### **World Water Day - general**

March 22nd is World Water Day—a date that highlights the continuing and critical need for access to safe water and sanitation.

The Water.org team offers support to interested journalists and producers—by sharing informative insights around access to safe water and water’s connection to health, gender-equity, and climate.

Please let us know if World Water Day, and upcoming United Nations Water Conference, scheduled for March 22-24 may be of interest to \_\_\_\_.

#### **World Water Day – financial/business**

March 22nd is World Water Day—a date that highlights the continuing and critical need for access to safe water and sanitation.

The Water.org team offers support to interested journalists and producers—by sharing informative insights around access to safe water and water’s connection to health, gender-equity, and climate. Our unique solution mobilizes capital to close the gap on financing to solve the global crisis.

Please let us know if World Water Day, and upcoming United Nations Water Conference, scheduled for March 22-24 may be of interest to \_\_\_\_.

#### **World Toilet Day – general**

UN World Toilet Day highlights importance of women and girls having access to safe water and a hygienic toilet. We have stories from the field, experts to speak with and some astounding facts about the 2+ billion who live without access to a toilet. Let us know if \_\_\_\_ would be interested,

### **World Water Day – book**

Each year World Water Day highlights the critical importance of access to clean water and sanitation for everyone, everywhere. Water connects every aspect of life, and access to safe water and sanitation improves health for women, children, and families.

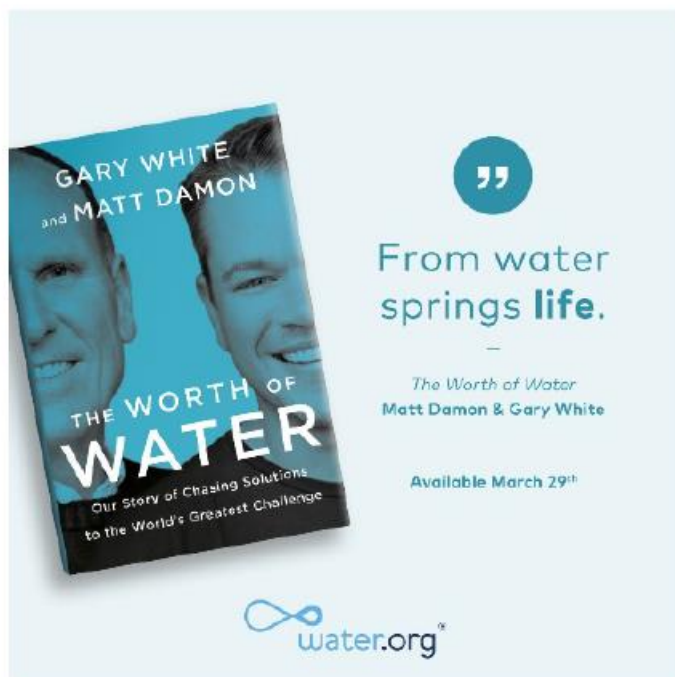
News outlets are important partners for reporting on this crisis each year, and equally important in spotlighting people and organizations doing great work in bringing safe water to people living in poverty.

For World Water Day 2022, we offer our knowledge and experts around this global crisis, its impact on health and how having access to safe water improves early childhood development and gender equality.

Please let us know if you are interested in speaking with a member of our team.

P.S. As you probably know, we are publishing Gary White and Matt Damon's first book, **THE WORTH OF WATER: Our Story of Chasing Solutions to the World's Greatest Challenge** (Portfolio/Penguin; On sale March 29).

If you would like to receive a review copy, please let me know and we will be happy to have the publisher send one. And in the meantime, I've attached a graphic that you are welcome to share in celebration of World Water Day.





### Example of Earned Broadcast Media

[ABC Prime News “Water Warriors”](#). This is an example of news coverage done very well. The decision was made not to support the ABC crew’s visit to the field – in the main due to fear of exploitation. We worked to have influence over the programming by inviting our contractor in Mexico to act as their guide and source as a “local water and sanitation expert”. We wanted the coverage for the programs in Mexico, for our partners, and to show the viability of finance as a tool while honoring the spirit behind the decision not to support the ABC team.

Because Water.org was not mentioned in the Mexico coverage that bracketed the co-founder interview, ABC was able to go in-depth. If we had been mentioned, it would have looked like a commercial for Water.org and the producer would have cut the segment in half.

Focusing on our in-country partners is a strategy that puts the issue at the center and gives the news media more license to cover the story. This strategy lifts our brand through association and gives the revenue team a powerful tool to engage new and existing partners.

For an example of how to manage earned news media – they can be touchy about their sovereignty - below is my email to the Executive Producer.

TO: Jon Schlosberg, Executive Producer, ABC News Prime [response to questions by Jon]

I do not want any mention of Water.org. Jimena is participating as an individual water sector expert. She consults with various organizations such as SARAR and [Isla Urbana](#). [Water.org partners]

Here is an NPR piece that highlights Isla Urbana’s work that you might find interesting <https://www.npr.org/2023/03/22/1165464857/billions-of-people-lack-access-to-clean-drinking-water-u-n-report-finds>

I am asking you not to include the interview with Gary and Matt as part of this segment unless it can be done with no connection. I cannot say this strongly enough – we do not support interviews with clients that have been served by Water.org. [While the main concern is for the well-being of those we serve, there is also a component of brand protection]

You are a news organization and I do not have the right to tell you how to manage your work. Below are my hopes.

1. As a purpose driven individual, I want the issues that people have with water in Mexico to be elevated.
2. Jimena is a water sector expert and a great local source. She is not an employee of Water.org and I do not have, nor would I exercise authority over her.
3. Water.org has chosen not to participate in this field visit due to lack of preparation time.
4. I applaud the effort to highlight reputable, successful local NGOs and service providers.
5. If Water.org funds any of those local organizations, I don’t want that fact broadcast.
6. If you choose to use the interview with Linsey, Gary, and Matt for this segment, it is my fervent hope that it not run in connection with the local interviews.



## **Feature: sample for Harvard Business Review**

### **Financial inclusion where it really counts**

Dear editors,

As the co-founders of Water.org and WaterEquity, we are interested in authoring a feature for HBR on how much can be achieved when financial inclusion meets some of the most fundamental necessities of life – like safe water and toilets.

Using our story as a primary example, we will explore what inclusion really promises and delivers: life transformations through small, practical solutions meeting humanity's basic needs, in a world where fewer people have toilets than have cellphones.

The data we have collected through our WaterCredit initiative, and the new breed of inclusion-driven initiatives like it, answer contemporary doubts about the truth of positive impact that plague impact investing, CSR (Corporate Social Responsibility), microfinance, and business in developing and emerging economies (described well in Morgan Simon's web article last June, [Can Impact Investing Avoid the Failures of Microfinance?](#)). The answer – and indeed, the answer to why we have devoted years of our lives to issues as un-glamorous as toilets and household water supply – is that truly inclusive finance enables people to meet their own most basic needs in ways that they already know will change their lives.

In Water.org's case this has rapidly led to the mobilization of \$XX billion in water supply and sanitation capital into the hands of poor households, with nearly 100% repayment. The recipients, XX% women and XX% living on under \$6 PPP a day, are investing in safe water hook-ups, toilets, and other ordinary components of a decent place to live. But what they are really doing is buying back part of their life – the share otherwise spent collecting water or falling sick from preventable diseases. Getting this time back to spend on other activities is where these small household investments have transformative impact.

This will be a very grounded, real-world feature topic with, nevertheless, surprising implications to explore. It will speak to investors who, wanting to follow through on their pledge to take on more of the ambition traditionally pursued by aid and charity, need to understand the meaning and math behind the aid world's focus on basic human needs. It will build on the case for social returns set out in the January-February feature [Calculating the Value of Impact Investing](#). It will speak to business leaders who have set their sights high on the world of technology and missed how ordinary people, including the extremely poor, actively participate in building their future. And it will cement the abstract notion of financial inclusion in a demonstration of what really matters in life.

### **About the authors**

Gary White is an observer, an innovator, and a passionate problem-solver. He has created solutions that have empowered millions of people in need with access to safe water and sanitation.

Gary is the CEO and Co-founder of Water.org and WaterEquity, nonprofit organizations dedicated to empowering people in the developing world to gain access to safe water and sanitation. Gary developed Water.org's WaterCredit Initiative, creating new financing options for poor populations to meet their water supply and sanitation needs. He also developed and now leads WaterEquity, the first-ever impact investment manager dedicated to ending the global water crisis in our lifetime, with an exclusive focus on raising and deploying capital to water and sanitation businesses that serve people living in poor communities throughout Asia, Africa, and Latin America.

Bringing more than 30 years of experience to work on solving the global water and sanitation crisis, Gary is a leading advisor in the water and sanitation space, counseling organizations such as the IKEA Foundation, Inditex, Reckitt, AB InBev, Amazon, the Water Resilience Coalition, and Bank of America on responses to the global water crisis. He is also a founding board member of the Millennium Water Alliance and Water Advocates.

Named to TIME magazine's list of the world's 100 most influential people, Gary has been awarded the Forbes 400 Lifetime Achievement Award for Social Entrepreneurship, named to the World Economic

Forum's Global Agenda Council on Water, and selected as Schwab Foundation Social Entrepreneur and a Skoll Foundation Social Entrepreneur.

Gary's educational credentials include three degrees in Civil and Environmental Engineering from the University of North Carolina at Chapel Hill and the Missouri University of Science & Technology.

**Matt Damon** is a Co-founder of Water.org & WaterEquity. Academy Award winner Matt Damon is an actor, screenwriter, producer and humanitarian, who has garnered international acclaim for his work both on- and off-screen.

Inspired during international travel with his family throughout Mexico and Guatemala as a youth, Matt has long been devoted to environmental and social issues. Learning about the immense challenges of accessing safe water and sanitation in Sub-Saharan Africa, Matt decided to create the H2O Africa Foundation. In 2009, he teamed up with Gary White to join their organizations and launch Water.org.

For his work as Co-founder of Water.org, Matt, along with fellow Water.org Co-founder Gary, was recognized as one of the TIME 100 most influential people in the world in 2011 and received the Environmental Media Award from The Environmental Media Association in 2013. In 2014, the World Economic Forum named Matt as the Crystal Award winner for his work through Water.org. Matt's active participation in his organization's work, including site visits to multiple countries, strategy development, advocacy, and high-level meetings with institutions like the World Bank and the World Economic Forum over the past decade, has positioned him as one of the world's experts on water and sanitation issues.

If you are interested in this feature, we will prepare a proposal and narrative outline.

Thank you very much for your consideration.

## Op-ed / written interview request

### Description

The Senior Advisor is primarily responsible for engaging all internal stakeholders and creating the initial draft for publication.

### Guiding principle

Written Q&A interview or op-ed articles provide an opportunity for our organizations to present insights and thought-provoking ideas to engage key audiences around the global water issue and solutions surrounding our work and mission. It also supports partner engagement needs for Strategic Development and WaterEquity.

If writing for MD, we use pre-approved, previously recorded material. All new material must be approved by the OCEO.

### PARIS

Participant	Accountable	Review required	Input required	Sign-off required
Matt	CEO	Chief of Staff Matt's publicist	Strategic Development WaterEquity	C-level executive of the respective area Chief of Staff
Gary	CEO	Chief of Staff	Strategic Development WaterEquity	Chief of Staff
Senior leader	Senior leader	Situational	Situational	

### Process

Engagement request	Public affairs pitches or assesses all requests and engages internal stakeholders to provide key facts and insights	Public Affairs supplies initial draft and requests review and approval from internal parties	Final draft approved by key parties and shared with external partner
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### Players

Players	Beltway Media	Public Affairs	Scriptoria/West Wing
POC	Media consultant	Senior Advisor	Senior Advisor
Role	Assess opportunity, value, risk, audience, and reach – source and substantiation.	Supplies initial draft using key message inventory and/or outside contractor as warranted	Outside writing contractors

<b>Responsibility</b>	Reputational red flag review	Initiate, manage, edit, gather approvals, deliver, monitor.	Draft article upon request
	Provide publication landscape		
<b>How/when to engage</b>	PA will consult at outset of project & obtain publication landscape	RMs reach out with partner request.	Pa will engage Scriptoria for thought leadership articles with or without co-authors.
	External request assessed immediately.	External request routed to PA.	PA will engage West Wing for top tier feature or cover story with cofounders.
<b>Tools</b>	Various software owned by contractor	Key message <a href="#">inventory</a>	
		Previous articles and video transcripts	

#### *Dos & Don'ts*

<b>Op-Ed</b>	<b>Dos/OK</b>	<b>Don'ts/Not OK</b>
	Pull from our approved fact sheets Use Marketing messaging guide If writing for MD, we use what is approved and publicly available. Bylines that include MD are coauthored with a senior leader. Gary or another senior leader's name is listed first in any publication. For MD, obtain sign-off from Viewpoint for cover stories and use of images. If both co-founders are not required, add a diverse voice.	Do not permit use of MD image to lift another brand.  Do not use facts or statistics without attribution/citation.

#### **Conferences & events**

##### *Description*

Conferences are meetings around a particular topic. Events can be public or private: celebration, ceremony, or festival.

### Guiding principle

Conferences and events give us an opportunity to address many people at once and substantively connect with a few people. Provides an opportunity for fundraisers and investment raisers to network and build their pipeline.

### PARIS

Participant	Accountable	Review required	Input required	Sign-off required
Matt	CEO	Chief of Staff	Strategic Development WaterEquity	C-level executive of the respective area Chief of Staff Matt's publicist and/or agent
Gary	CEO	Chief of Staff	Strategic Development WaterEquity	Chief of Staff
Senior leader	Senior leader	Situational	Situational	

### Process

Public affairs maintain an annual landscape of events and cultivates relationships with event organizers/bookers.	Public Affairs engages with event organizers/bookers to co-create impactful engagement	Public Affairs manages the preps calls, recommends key messages and talking points, and provides content for briefs when needed
Assesses incoming event requests and engages internal stakeholders to confirm value.		

### Players

Players	Public Affairs	OCEO/Direct Manager	Viewpoint LA	Internal parties
<b>POC</b>	Senior Advisor	Chief of Staff	Jennifer Allen	SD point of contact
<b>Role</b>	Manage event participation	Cofounders' relationship manager/senior leader supervisor	Matt's publicist	Relationship manager
<b>Responsibility</b>	Identifies appropriate subject matter expert.  Consult internal parties	Co-founders decision maker/senior staff member decision maker	When MD is involved, provides input on Matt's needs for appearances	Provide key messages and recommendations on 1:1 meeting

	Coordinate participation.			
<b>How/when to engage</b>	Incoming requests are sent to PA upon receipt.	Once assessment is complete and business case made	When MD is involved, consult upon final OCEO approval to go ahead	In parallel with Chief of Staff
<b>Tools</b>	Brief <a href="#">template</a>			Key message <a href="#">inventory</a>

### *Dos & Don'ts*

Events	Dos/OK	Don'ts/Not OK
	<p>Engage with Strategic Development and WaterEquity at the beginning of the assessment</p> <p>Thorough review of conference or event speakers and sponsors to identify existing relationships or potential relationships</p> <p>Lead on session creation</p> <p>Provide recommendations on panelists/moderator</p> <p>Maximize value by adding published content if able</p> <p>If cofounders are involved, control who is in the room with them</p> <p>Discuss social posts and require approval</p> <p>Use approved bios and headshots</p> <p>Manage expectations with clear communication</p> <p>Ask about travel expenses – many of our subject matter experts do not have travel budget</p> <p>Enforce DEI values.</p>	<p>Do not permit use of MD as a headliner without negotiation and support from Viewpoint</p> <p>Do not confirm a participant without explicit approval</p> <p>Do not permit recording without a use agreement/release</p> <p>Do not deploy MD without considering and addressing security needs</p> <p>Do not allow our ambassadors to participate in homogeneous panels. No 'manels'.</p>

## Asset use

This section covers use of organizational assets, such as B-roll, bio, headshots, and marketing resources, and co-founder assets, such as photos, videos, quotes, images, etc.

### Organizational asset

#### Description

External parties may make a request for organizational assets including B-roll, bio, headshots, and marketing resources to promote an engagement.

#### Guiding principle

We center the issue and mission of Water.org not the event or people.

#### Process

Request received from an external stakeholder	Inform internal stakeholders if necessary	Inform Cofounder(s) representatives if necessary	Share assets if pre-approved.  Share updated resources once approved.	Follow up with external partner.
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#### Players

Players	OCEO	Marketing   WO	Marketing   WE	Viewpoint LA
POC	Chief of Staff	Director, Brand Marketing	Director, Communications	Jennifer Allen
Role	Cofounders' relationship manager	Brand asset and communication	Brand asset and communication	MD publicist
Responsibility	Approves Co-founders bio and headshot	Approves new internal assets	Approves new internal assets with compliance review	Vet and approves MD images
How/when to engage	For MD/GW assets	For all other assets	Assets	When new MD content is needed
Tools	<a href="#">GW Assets</a>	Marketing resources (Flickr, YouTube videos, B-roll, messaging guide)	Contact directly	<a href="#">MD Assets</a>

#### Dos & Don'ts

Org asset	Dos/OK	Don'ts/Not OK
	Water.org retains the right to approve each social post in advance.  Partner may use B-roll provided to produce videos.	Do not distribute unapproved assets.  Do not make agreements in perpetuity without attorney review.



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Water.org retains the right to approve final video and use before release.

Look for DEI violations and correct as you are able by adding diversity.

## Co-founder assets

### Guiding principle

When selecting an image, video segment, or quote for social media posting, it is important to center the issue. A quote from Matt or Gary saying we can solve this problem is reasonable, but it is the problem and solution that should take center stage. This is the spirit in which we engage Matt, and it is the agreement we have with his brand team.

### Process

Request received from external or internal stakeholder and assessed against priorities, calendar and for reputation risk	Inform internal parties if necessary	Inform Cofounder(s) representatives	Updated resource shared & approved	Follow up with external partner
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### Players

Players	OCEO	Viewpoint LA
<b>POC</b>	Chief of Staff	Jennifer Allen
<b>Role</b>	Cofounders' relationship manager	Matt's Publicist
<b>Responsibility</b>	Approves bio and headshot Manages relationship with Matt's team	Vet and approves Matt images
<b>How/when to engage</b>		
<b>Tools</b>	<a href="#">GW Assets</a>	<a href="#">MD Assets</a>

### Dos & Don'ts

Image and brand usage scenario	Dos/OK	Don'ts/Not OK
Image use	Share approved images of Cofounders as part of a speaker lineup Share approved images with partners for specific use – use agreement may be necessary Be mindful of DEI values	Do not give permission to use in perpetuity Do not permit MD's photo use for cover or as a headliner unless negotiated in advance
Quote	Share quotes from co-founders as part of a news release or promotion with approval of each use Use pre-approved quotes of Matt	Do not share MD quote as a standalone, couple with a quote from Gary or another senior leader.

Social post	Water.org retains the right to approve each social post in advance	Do not give permission in perpetuity
Pre-recording	Use quotes from the co-founders as part of promotion for event, with approval of each use.	Do not approve sharing of the recording after the event unless circumstance is outlined in writing
Matt's name and brand	MD name and approved likeness may be used to advertise a cofounder appearance with approval in writing	MD voice, likeness, image, biography, or other personal indicia of any kind may not be used for any reason, including but not limited to, an endorsement of any product, service and/or entity in connection with any merchandise or commercial tie-up or for any other purpose
<b>Events</b>	Assess event, organizers, and sponsors for reputational risk	All advertisements, promotions, and publicity materials for an event can be subject to prior written approval
Event Photography	Event photographer can take photos on-site solely for internal purposes only	MD may not be photographed or recorded at the event, without prior written approval
Private event	Event is closed to the media, but some attendees may be members of the media on background and subject to approval	Use of the Publicity Materials is not permitted post Event Date
Public event	Cofounders or another senior leader can headline an event if negotiated in advance.	Do not isolate MD. MD is not to be singled out as headliner or speaker.
<b>Media</b>	Vet request (reputational red flag assessment, upside, downside, etc.)	Expressly forbid questions related to MD personal life, family, politics, day job, or trending issues unless specific to the mission of Water.org and WaterEquity.
Press release	Center WASH/WSS issues and Water.org's solutions/programs	Do not Isolate MD – quotes are provided by both Cofounders and MD with another senior leader
Appearance	<p>Thoroughly vet the interviewer and platform</p> <p>Set topic boundaries in advance; no questions about family, day job, politics, or whatever is trending.</p> <p>Pre-approve questions, co-create if possible.</p> <p>Set time constraints.</p> <p>Provide background material</p>	Do not isolate MD – either Gary or another senior leader will be a part of the conversation

	Ask for recording review	
<b>Partnership</b>	<p>Execute a formal agreement by co-founders' signatures that governs content, use, timing, and manner of use through Water.org Contracts and MD attorney.</p> <p><i>Guiding principle:</i> MD brand is used directly (not by association) in favor of Water.org and WaterEquity's brand. Matt is using his brand to bring awareness to the org's mission</p>	Do not use MD brand to lift another brand. For example, in a partner's press kit, promotion, or campaign

*Sample of Speaker and Use Agreements* ([link](#))

#### Background

We used to treat both co-founders like employees with Water.org signing releases. There were times we appended the co-founders' e-signatures, with OCEO approval.

That began to change when the publicist from Viewpoint became involved with the promotion of The Worth of Water. The complexities of the Stella relationship and the backlash from the crypto.com commercial solidified our process of obtaining attorney review of our releases.

Currently, any use of Matt's name, likeness, or image requires a release, and that release must be reviewed by Matt's attorney who will then obtain his signature. We can use the release language the attorney signs off on for Gary as well.

It would be worthwhile to explore a pathway back to a simpler time. Templates can also shorten the lead time on negotiating releases.

## Agreements

### Term of Reference

#### Description

A Term of Reference (TOR) provides a documented basis of agreement to work with an external party to accomplish a shared goal. TOR can take a form of email documenting offer, consideration, and acceptance of an event or a legal document (release form) describing scope of event, resources, and deliverables.

#### Guiding principle

A TOR demonstrates an open understanding of both parties' roles and responsibilities. Most importantly, it communicates any agreements made between the parties.

#### PARIS

Participant	Accountable	Review required	Input required	Sign-off required
Matt	CEO	Chief of Staff	Strategic Development WaterEquity	C-level executive of the respective area Chief of Staff Matt's publicist and legal team
Gary	CEO	Chief of Staff	Strategic Development WaterEquity	Chief of Staff Water.org legal
Senior leader	Direct Manager	Situational	Situational	Direct Manager

#### Process

Partner reaches out to request subject matter expert for an opportunity	Internal point of contact engages and consider the opportunity	Both parties discuss resource, scope, and deliverables	External party shares draft agreement	Both parties review and execute final agreement
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#### Players

Players	Public Affairs	OCEO	Viewpoint LA
<b>POC</b>	Partners with requestor	Chief of Staff	Jennifer Allen
<b>Role</b>	Establishes rules of engagement	Cofounders' relationship manager	Matt's Publicist
<b>Responsibility</b>	Drafts agreements		Reviews agreement, directs to attorney as needed
<b>How/when to engage</b>	Immediately		When agreement is drafted

**Tools**

Sample agreement  
[Tradeshift Davos](#)

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*Dos & Don'ts*

Engagement/release form	Dos/OK	Don'ts/Not OK
	<p>It is important to note an email can be taken as tacit agreement – use words mindfully. Be specific, thorough, and timebound.</p> <p>Contact our Legal department before entering into an agreement.</p>	<p>100% commit anyone for anything. Emergencies happen, people can be called away – always leave a door open and have a plan B.</p>

## Fees / donation

### Description

Engagement fees are negotiated in the form of donations to Water.org. Fees are negotiable.

### Guiding principle

A speaking fee is always desirable, but not necessary. The fee amount is negotiable and dependent on the value of the convening and the value of concierge services available.

Payment language is written as **a donation to Water.org** in engagement agreement. The agreement to perform with be made between Water.org and the organizer. Our Legal and MD attorney will need to review the agreement before executing. Water.org Legal will provide a template.

### PARIS

Participant	Accountable	Review required	Input required	Sign-off required
Matt	CEO	Chief of Staff	Strategic Development WaterEquity	C-level executive of the respective area Chief of Staff Matt's publicist and legal team
Gary	CEO	Chief of Staff	Strategic Development WaterEquity	Chief of Staff
Senior leader	Direct Manager	Situational	Situational	Direct Manager/HR

### Process

Key internal team member confirms Cofounder participation	Key internal team negotiates engagement fee	Both parties agree on engagement fees	Engagement fee is drafted into the formal agreement	Both parties execute the agreement
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### Players

#### Senior leaders

Players	Public Affairs	Direct manager	Water.org Legal	Water.org FIN + DEV Ops team	HR
POC	Senior Advisor	Manager	Legal team	Revenue team	Head of HR
Role	Make recommendation	Review	Contract review	Track fee deposit	Review staff participation



<b>Responsibility</b>	Negotiate engagement fee with external party	Approve	Executes contract on behalf of Water.org	Receives notification of incoming donation  Confirms arrival of donation	Approve payment
<b>How/when to engage</b>	As needed	Before finalizing agreement	After execution of agreement	After execution of agreement	As needed
<b>Tools</b>					

#### Cofounders

<b>Players</b>	<b>Public Affairs</b>	<b>OCEO</b>	<b>Legal teams</b>	<b>Water.org FIN + DEV Ops team</b>
<b>POC</b>	Senior Advisor	Chief of Staff	Legal teams – WO and MD	Finance and Revenue team
<b>Role</b>	Make recommendation	Cofounders' relationship manager	Contract review	Track fee deposit
<b>Responsibility</b>	Negotiate engagement fee with external party	Approve Co-founder engagement	Executes contract on behalf of Water.org and MD	Receives notification of incoming donation  Confirms arrival of donation
<b>How/when to engage</b>	As needed	Reviews agreement before finalizing with external party	Once draft is approved by both parties	When agreement is executed
<b>Tools</b>				

#### *Dos & Don'ts*

<b>Fee/donation</b>	<b>Dos/OK</b>	<b>Don'ts/Not OK</b>
<b>Co-Founders</b>	Assess reputation and risk of opportunity Consider warm connections with potential investors or strategic donors as value in lieu of all or part of the fee Note the fee as a donation in the engagement agreement Book purchase can be scoped into agreements when appropriate Share draft with Jennifer Allen/attorney	Do not make commitments without explicit approval from OCEO Do not approach the attorney without Jennifer Allen being looped in
<b>Senior leaders</b>	Assess reputation and risk of opportunity.	

	Engagement fee is noted in the engagement agreement Consult with HR	
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*Extras*

**Sample contract**

2022 [NYC Book events](#)

## Risk

### Description

Reputational risk can occur when the expectations of the external party are higher than the reality of what had been delivered or when an opportunity jeopardizes our organization's values.

### Guiding principle

Protect Water.org, WaterEquity and every individual's brand as if it were your own. Do not expose us to controversy. Do not engage journalists who chase clicks and likes. We associate with highly regarded events, ethical and honest partners, and serious journalists who have a proven reputation for fair dealing.

### Process

Key internal member vet opportunity and flag risk	Key internal member assesses and shares value of opportunity to key internal members	
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### Players

Players	Public Affairs	Beltway Media
POC	Senior Advisor	
Role	Make recommendation and guidance	
Responsibility	Assess reputational risk for all requests and opportunities	
How/when to engage	Before negotiations begin	
Tools		

### Dos & Don'ts

Risk	Dos/OK	Don'ts/Not OK
	<ul style="list-style-type: none"><li>Clearly communicate expectations of deliverables and ensure all parties understand the outcome</li><li>Assess whether the value of an opportunity creates risk to internal and external organization values and performance</li><li>Be objective, proactive, and specific when engaging with external parties</li><li>Adapt to changes that may occur and communicate new changes to all parties ASAP</li></ul>	<ul style="list-style-type: none"><li>Do not assume a specific journalist has the reputation their platform does</li><li>Be blinded by \$\$ or perceived need</li><li>Fail to research thoroughly every opportunity – even if it is one that was green flagged in the past.</li><li>Commit anyone without an explicit green light</li></ul>

### Extras

Assess all opportunities using flag system below

Flag	Definition	Recommendation
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<b>Red</b>	After initial review, latest news, social posts, and other digital evidence of personal and professional improprieties. Record of malfeasance, lying, gotcha questions, other evidence of unethical behavior.	<b>Pass</b>
<b>Yellow</b>	After initial review, latest news of poor outcomes, business practices, and related personal, professional challenges.	<b>Pass</b> or <a href="#">inquire/learn more</a>
<b>Green</b>	After thorough review of background, and latest news and social items featuring accomplishments both personal and professional. Requests align with Water.org/WaterEquity's current goals and target audiences.	<a href="#">Move Forward</a>
<b>Gray</b>	No evidence of claims, no evidence of accompaniments and no evidence of editorial and social footprint that aligns with Water.org/WaterEquity	<b>Pass</b> or <a href="#">inquire/learn more</a>

## Engaging Co-founders

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### Summary

External engagements opportunities for Water.org & WaterEquity co-founders, Gary White & Matt Damon, have played a key role in advancing revenue, brand equity, fund investments, and impact partnerships.

We are interested in engaging with a resource to help us develop a strategy to fully leverage all that our cofounders can bring to Water.org & WaterEquity. Provided below is a high-level description of our current thinking around cofounder engagements.

### Players

#### **WME (William Morris Endeavor) | Matt's brand partnership agent: Rob Koslowsky**

WME can help us assess the value of Matt's participation in an engagement. To date, the primary way in which WME has engaged is through the Stella Artois partnership, helping to set Matt's fee (which he donates to Water.org) and negotiate contract details.

#### **Viewpoint | Publicist: Jennifer Allen**

Viewpoint is informed of all requests of Matt, most of which we decline due to lack of fit. In certain media engagements (e.g., The Daily Show), Viewpoint may be involved to support Matt.

#### **Ziffren Brittenham LLP | Attorney: Brian Lazarus**

Ziffren Law informed of all engagement/release form requests for Matt, most of which take at least ten days to fully execute between parties.

### WaterEquity

It is essential that WaterEquity review public remarks for compliance with SEC regulations

### Water.org & WaterEquity teams

To date, the Public Affairs department at Water.org has played point in assessing and managing most external engagements for Gary & Matt (notable exception: Stella Artois engagement is managed by the brand marketing team).

### Sourcing opportunities

Most engagement opportunities surface through direct requests made to our organization(s) and through partner requests. We also proactively seek opportunities through Public Affairs networks when we know we have co-founders available.

Key events/dates are: The World Economic Forum Annual Meeting, World Water Day, Stockholm World Water Week, and Climate/UNGA week.

### Assessment

The following information is considered when assessing opportunities:

- Alignment with Water.org and/or WaterEquity mission & culture
- Audience type: we place greater value on individuals who are ultra-high net worth, thought leaders, top tier media, celebrities, business executives, or are funding decision-makers for foundations or corporations.
- Potential return on investment for Water.org and/or WaterEquity, particularly:
  - raising funds: donations, investments
  - reach & engagement: media, social network, impressions
  - level of influence
- Level of effort for co-founder(s) and Water.org team
- Unique value-add or gain specific to Gary and/or Matt
- Reputation checks of all organizations and persons related to opportunities

## Co-Founder Engagement

### Description

This section covers any engagement with cofounders and outlines the steps to initiate.

### Guiding principle

- When seeking approval of Cofounder participation in engagement opportunities, requestors should assess each opportunity against their goals & priorities. Requestors present the business case and objective in engaging the Co-founders to OCEO.
- OCEO then assesses the request against organization goals & priorities.

### PARIS

Participant	Accountable	Review required	Input required	Sign-off required
Matt	CEO	Chief of Staff	Strategic Development WaterEquity	C-level executive of the respective area Chief of Staff Matt's publicist and/or agent
Gary	CEO	Chief of Staff	Strategic Development WaterEquity	Chief of Staff

### Players

Players	OCEO	Viewpoint LA	WME	Ziffren Law
POC	Chief of Staff	Jennifer Allen	Rob Koslowsky	Brian Lazarus
Role	MD relationship manager	Matt's Publicist	Matt's brand agent	Matt's legal
Responsibility	Engagement opportunities are approved by CEO	Provides input on Matt's media and event appearances	Negotiate contract deals to engage Matt in partnership campaigns and multi-year high profile engagements	Review and fully execute Matt's media and event releases
How/when to engage	When business case is ready to be made	Review approved public appearance	Brand partnerships	Upon recommendation by Jennifer Allen
Tools	<a href="#">Cofounder assessment</a>			

## Dos & Don'ts

Dos/OK	Don'ts/Not OK
<p>Clearly communicate expected deliverables and ensure all parties understand the outcome</p> <p>Assess whether the value of an opportunity creates risk to internal and external organization value and performance</p> <p>Be objective, proactive, and specific when engaging with external parties</p> <p>Adapt to changes that may occur and communicate changes to all parties ASAP</p> <p>When declining opportunities, be vague – 'previous commitment' works well</p> <p>Control who is in the room with cofounders</p>	<p>Do not assume a specific journalist has the reputation their platform does</p> <p>Don't be unduly influenced by \$\$ or perceived need</p> <p>Do not fail to research thoroughly every opportunity – even if it is one that was green flagged in the past.</p> <p>Don't commit the cofounders without an explicit green light from the OCEO</p> <p>Don't misrepresent the likelihood of securing cofounders – this reflects poorly on them when we cannot fulfill the request</p> <p>Don't be specific on declines</p>



## Monthly reporting to Viewpoint LA

All requests made for Matt's time or participation are collected into a monthly or bi-monthly report for Matt's publicist.

### Guiding principles

Viewpoint LA is kept aware of requests for MD and the status of those requests so they can respond appropriately if requestors reach out to them.

### Process

1	2	3	4
External party emails contacts WO/WE for a Matt ask	Public Affairs receives and vets opportunity	Key internal member responds to politely decline or explore opportunity	Key internal member shares request in bi-monthly report to Viewpoint

### Stakeholders

Lead	Role	Responsibility	Resource/template
Public Affairs	Senior Advisor	Collects Cofounder incoming requests Flags opportunity to key internal members Engage and respond to request when appropriate Shares request in bimonthly report to Viewpoint LA	<a href="#">MD reports for Viewpoint</a>

### Extras

Sample email to Viewpoint LA

Hello,

Attached, please find the recent report of requests for Matt's time and participation. All requests have been responded to and no action by Viewpoint is needed.

## Managing Cofounder accounts

Internal Water.org email account helps key internal team members manage direct media or speaking engagement requests.

### Guiding principles

Cofounder email account is used to manage high profile connections related to our work and priorities.

### Process

1	2	3	4
External party emails Cofounder	Key internal member receives and vet opportunity	Key internal member responds to politely decline or explore opportunity	Key internal member shares request in bi-monthly report to Viewpoint LA

### Stakeholders

Lead	Role	Responsibility	Resource/template
Public Affairs	Senior Advisor	Monitors Cofounder account for incoming requests Flag opportunity to key internal members Engage and respond to request when appropriate Shares request in bi-weekly report to Viewpoint LA	mdamon@water.org
Strategic Development	Open position	Monitors accounts Flag opportunity to key internal members Engage and respond to request when appropriate Forward requests to Public Affairs	Garywhiteandmattdamon@water.org This email account is not active

Dos/OK	Don'ts/Not OK
<p>Policy under review: IT to obtain sign off from Marketing Director to create new email addresses that are general and public facing.</p> <p>Write a process plan outlining RACI to manage the email account</p>	