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Smithsonian Institution

Office of General Counsel

VIA ELECTRONIC MAIL

August 29, 2014

RE: Your Request for Smithsonian Records (request number 42569)

This responds to your request dated and received in this Office on August 4, 2014 for Smithsonian records pertaining to "the brand valuation assessment conducted...to assess/estimate the value of the Smithsonian Institution 'brand.'" The Smithsonian responds to requests for records in accordance with Smithsonian Directive 807 - Requests for Smithsonian Institution Information (SD 807) and applies a presumption of disclosure when processing such requests. The policy is posted on our website at www.si.edu/about/FOIA.

Enclosed are thirty-two pages of material responsive to your request, numbered SI-000001 through SI-000032. Please note that thirty pages are appropriate for release without redaction and are provided in their entirety. Certain material has been redacted consistent with SD 807 and protected by the deliberative process and attorney-client privileges under Exemption 5. In addition, one page containing confidential commercial information has been withheld in full consistent with SD 807 under Exemption 4, where release of the information would likely cause substantial competitive harm to a third party. Finally, 105 pages of predecisional and deliberative briefing materials, notes, and proposed timelines have been withheld in full pursuant to Exemption 5.

This concludes the Smithsonian's response to your request.

Sincerely,



Jessica Sanet
Assistant General Counsel

Enclosures

You have the right to appeal a partial or full denial of your request. Your appeal must be in writing, addressed to the Smithsonian Institution Office of General Counsel at the address below, and made within sixty days from the date of this response letter. Your letter must explain your reason(s) for the appeal. The Smithsonian Under Secretary for Finance and Administration will decide your appeal and will respond to you in writing.

SMITHSONIAN BRAND STRATEGY



PROPOSED FINAL RECOMMENDATION
BOARD OF REGENTS
JUNE 27, 2011

**THE SMITHSONIAN BRAND:
FROM ACCIDENTAL TO INTENTIONAL**

MORE THAN THE NATION'S ATTIC

WHAT DOES OUR BRAND NEED TO DO?

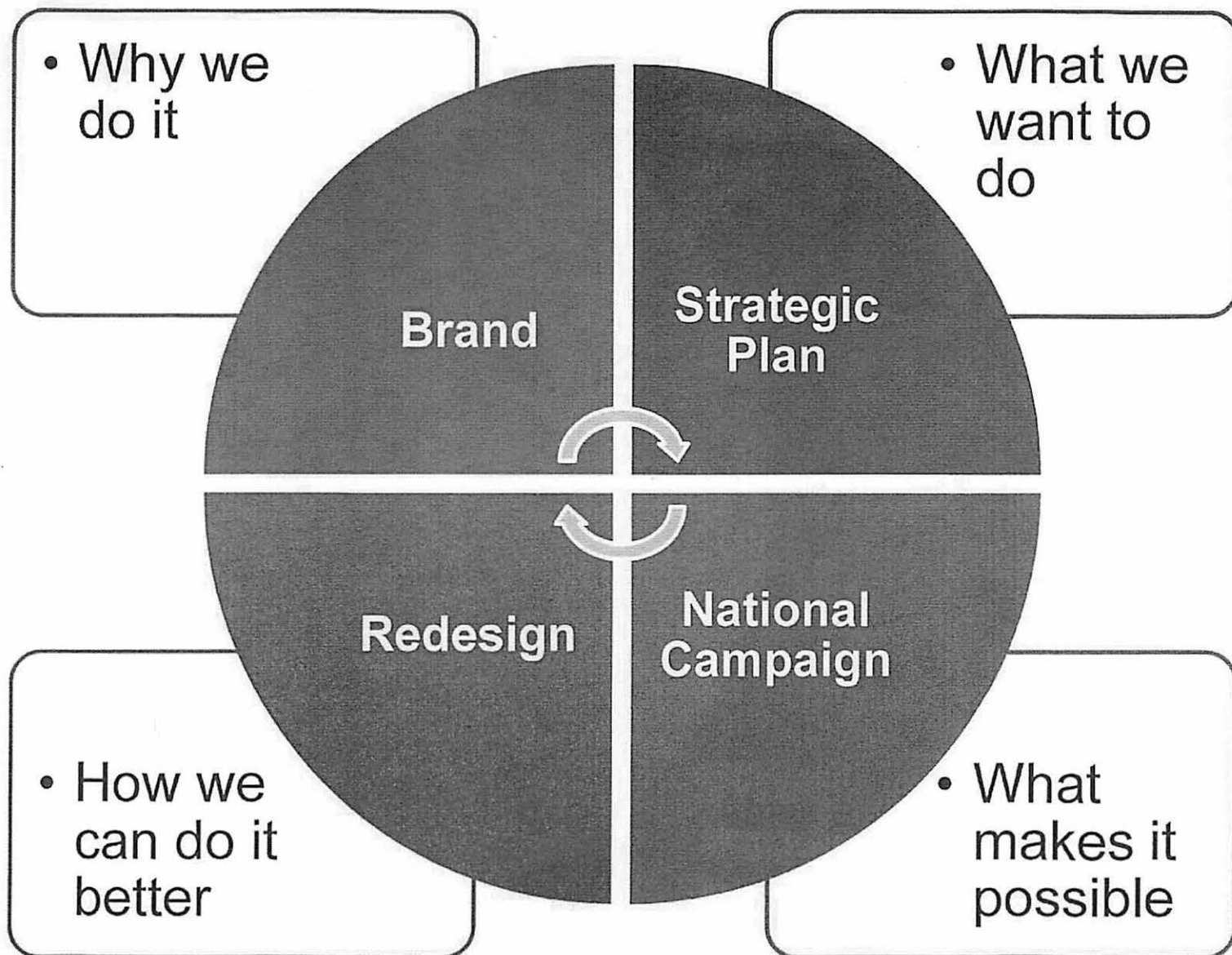
Be more relevant

Reach more people

Help the Smithsonian realize its vision for the future

Represent the overall Smithsonian and individual
units

**BRAND =
RECIPE FOR
SUCCESS**



NOT ONLY
KNOWLEDGE

BUT ALSO
LEARNING

NOT ONLY
**WHAT WE THINK IS
IMPORTANT**

BUT ALSO
**WHAT PEOPLE THINK IS
IMPORTANT**

BALANCE OF ACHIEVABLE AND ASPIRATIONAL

NOT ONLY

BUT ALSO

NATIONAL INSTITUTION

UNIVERSAL LENS

AMERICAN EXPERIENCE

AMERICAN SPIRIT

INSIDE OUT

OUTSIDE IN

THE PUBLIC

REAL PEOPLE

SPECIAL OCCASION VISIT

INDISPENSABLE RESOURCE

WHAT WE HAVE

WHAT WE DO

KNOWLEDGE DELIVERY

COLLABORATIVE LEARNING

REDEFINING OUR ROLE

**THE INCREASE AND
DIFFUSION OF KNOWLEDGE...**

TO WHAT END?

SMITHSONIAN INTERNAL PURPOSE

**EXCITING
THE
LEARNING
IN EVERYONE**

OUR INTERNAL PURPOSE

EXCITING THE LEARNING IN EVERYONE



Sparking
Stimulating
Energizing
Inciting emotion



Active process
Iterative
Never-ending
Creates understanding



Innate
In all of us
Part of being
human



From age 3-93
From Pre-
school to PhD
From D.C. to
Detroit to Delhi
Individually and
collectively

**HOW ALL OF THE SMITHSONIAN CAN PARTICIPATE
EXCITING THE LEARNING IN EVERYONE
WITH SCIENCE
THROUGH ART
ABOUT HISTORY
FOR CULTURE
THROUGH EXHIBITIONS
WITH TECHNOLOGY**

HOW DOES THIS TRANSLATE EXTERNALLY?

TALKING POINTS

WHAT IS THE SMITHSONIAN?

We are a universal lens for learning

- Microscope, telescope and kaleidoscope
- Translate and transform what we know into one-of-a-kind experiences
- Using our amazing combination of 137 million treasured objects, over 50 museums, laboratories and libraries, and thousands of experts across history, art, culture and science

We reflect the American spirit

- Pioneers in creating and sharing knowledge since 1846
- Public service mission driven by discovery, creativity and innovation
- Diverse partnership of people all over the world

We spark learning in everyone

- Spur everyday discoveries and cutting-edge breakthroughs
- Tap into people's curiosity and invite them to explore with us and on their own
- Inspire infinite possibilities for ourselves, others and the world

HOW DOES THIS TRANSLATE EXTERNALLY?

TAGLINE



SERIOUSLY AMAZING

**WHAT POSSIBILITIES
DOES THE BRAND
SUGGEST?**

TESTING THE BRAND STRATEGY: MAJOR FOCUS GROUP FINDINGS

“Seriously Amazing” makes all audiences think about the Smithsonian in a new way

“Seriously Amazing” works best when in context

The Smithsonian needs to help people discover what will be “Seriously Amazing” to them

Testing confirms early research about learning preferences

BRAND IMPLEMENTATION NEXT STEPS

**TELL
THEN
SHOW**

**INSIDE
THEN
OUTSIDE**

MEASURING SUCCESS: METRICS


INTERNAL

Establish expectations for internal brand activation and track actions and attitudinal shifts over time

EXTERNAL

Establish baseline and track key external perceptions on brand awareness, relevance and accessibility

SMITHSONIAN BRAND STRATEGY



PROPOSED FINAL RECOMMENDATION
BOARD OF REGENTS
JUNE 27, 2011

**Board of Regents
Smithsonian Brand Strategy Update
September 2011**

In preparation for the presentation by Director of Communications and External Affairs Evelyn Lieberman at the September 19 Board of Regents meeting, the following documents are provided as information. They describe the work that has been done to begin Phase 1 implementation of the brand strategy following the approval of the Board at its June meeting, and address some questions raised by Regents at this and prior meetings. Those questions focused on the selection and usage of the tagline *Seriously Amazing*, the plans for internal and external implementation, interest in the internal reaction to the brand strategy at workshops to be held over the Summer, and the plan for brand metrics. At the September 19 meeting, Mrs. Lieberman will provide the Regents with her assessment of the implementation activities conducted to date, focusing on the reaction of internal stakeholder groups, as well as opportunities and challenges identified.

Materials include:

- 1. Brand Summary Charts**
 - Two slides that summarize the deliverables of the brand strategy
- 2. Tagline Overview and Guidelines**
 - An overview of the tagline selection decision and guidelines for and timing of its use
- 3. Implementation Timeline**
 - A color coded calendar showing the sequence of internal and external brand strategy implementation activities
- 4. Implementation Activities Descriptions**
 - A short paper that provides description of the categories on the timeline
- 5. Metrics Overview**
 - A brief description of planned metrics for the brand

BRAND SUMMARY

	Brand Internal	Brand External
Tagline	Exciting the Learning in Everyone	Seriously Amazing
Purpose	To help everyone understand what we need to do to be successful	<ul style="list-style-type: none"> •To invite the world to take a fresh look at us •To describe the experience we can deliver
Audience	Staff and volunteers	The public, emphasis on new audiences
Tone	Motivational	Modern, fresh
Use	Internal only	External, limited by guidelines
Brand Messages: Our Story	We are a universal lens for learning We reflect the American spirit We spark learning in everyone	

BRAND AND CAMPAIGN: CONNECTIONS

	Brand Messages – Our Story	Campaign Messages – Our Case
Purpose	Tell the story of what the Smithsonian is today and what it could be tomorrow	Tell the story of what the campaign will do for the Smithsonian
Use	<ul style="list-style-type: none"> •To help everyone understand what we need to do to be successful •To help make decisions about what to do and how to do it •To help tell the world who we are and want to be 	<ul style="list-style-type: none"> •Show how the campaign will help us meet our goals •To tell our donors who we are and want to be
Audience	<ul style="list-style-type: none"> •Staff and volunteers •External stakeholders •The public 	<ul style="list-style-type: none"> •Boards and campaign volunteers •Current and potential donors
Tone	Modern, fresh	Classic, inspirational
Scope	Covers all of Smithsonian	Covers campaign needs and 7 year time period

Smithsonian Brand Tagline Overview and Guidelines

BACKGROUND

What is a tagline?

A tagline is a short, memorable phrase that is associated with an organization and is aimed at customers or audiences. It serves a specific purpose and is designed to evoke a specific response. For example, they can be used to describe what the brand is, such as “The Breakfast of Champions” (Wheaties); to issue a call to action, such as “Just Do It” (Nike); or to make a promise, such as “Expect More. Pay Less.” (Target). Though taglines are designed to be memorable, they are not intended to last forever. Therefore a tagline should be reviewed periodically to determine whether it still meets the current needs of the organization. The shelf life of a tagline can vary, but can be anywhere from 3-5 years.

Why do we need a tagline?

The Smithsonian brand strategy reflects what is special about the Smithsonian and how those strengths can be leveraged to meet the needs and wants of an increasingly diverse public. The implementation of this strategy, and how it will be used to shape our actions and image, is the heart of the branding initiative. However, a major rationale for the branding initiative was that while the Smithsonian is well-known and well-regarded, its image is not reflective of the breadth and depth of all we do nor does it capture the future ambitions of the strategic plan. The Smithsonian also needs to attract and engage new, younger and underserved audiences. Therefore, it was decided to develop an external tagline to encompass the spirit of the brand strategy and present a new image to the public.

What were the criteria for the Smithsonian tagline?

For the Smithsonian tagline, we wanted a phrase that would:

- Invite the public to take a fresh look at the Smithsonian
- Ask them to think of us in a different way
- Use fresh, modern language
- Promise the experience that the Smithsonian can deliver to our audiences

How did we choose *Seriously Amazing*?

(b) (5)



(b) (5) The tagline *Seriously Amazing* was presented to the Board of Regents for approval at the June 2011 meeting.

Seriously Amazing emerged as the best choice because it evoked both the gravitas of the work we do and the “wow” moments we know we can deliver: The Smithsonian is both serious and amazing. It also

has a modern turn of phrase that most people would not associate with the staid image of the Smithsonian, and thus it is likely to entice people to see us differently. However, it is not so cute as to be inappropriate or silly. It is most likely to resonate with younger audiences (a key purpose of the branding initiative) but it is not so trendy or exclusive that it would alienate our existing base of support.

(b) (5)



In June 2011, a Class 41 trademark application (education and entertainment services) was filed with the U. S. Patent and Trademark Office (USPTO) signifying our intent to use *Seriously Amazing* in conjunction with the following services: education and museum services, namely, providing live and on-line exhibitions, programs, lectures, games and activities in the fields of science, history, art, music, culture and education. The USPTO review of the application should take approximately 3-6 months. If there is

no basis for rejection, the mark will be published for opposition by the public, including other users of similar marks. Assuming no opposition, the trademark will proceed to registration.

TAGLINE USE GUIDELINES

Why do we need guidelines about when and how to use *Seriously Amazing*?

The tagline *Seriously Amazing* is a specific phrase intended to invoke a particular reaction in those who view it. It promises our audiences the kind of experience they will have if they interact with the Smithsonian in person, online, or through our media offerings, outreach programs or other products and services. As the focus group testing shows, *Seriously Amazing* raises people's expectations about the experience they will have, and therefore should only be used in association with things that are, in fact, *Seriously Amazing*. To use it on everything, or just as interchangeable words without this requirement, would be to dilute the value of the tagline and worse, could risk alienating audiences if they feel the phrase is a false promise. Therefore, the tagline should be used in limited and purposeful ways.

How will the use of *Seriously Amazing* be regulated?

Unit directors will have the discretion to decide when to use the tagline and are responsible for ensuring that its use reflects the guidelines established by this and future guidance. The guidelines are described in the *Smithsonian Brand Tagline Usage Questionnaire* attached to this document. In deciding whether and how to use the tagline, directors should consider that inappropriate use or overuse will dilute the value of the phrase for their unit and the Smithsonian overall, and could risk alienating audiences.

Directors are asked to submit the *Smithsonian Brand Tagline Usage Questionnaire* to the Office of Communications and External Affairs when the tagline will be used, for information purposes only. This information will help us learn more about how and where the tagline is being used so we can assess its impact in future measurements of how well the brand is working to change our image.

The Office of Communications and External Affairs will conduct periodic reviews of how the tagline is being used and will request removal of any uses that do not reflect the guidelines.

When is it acceptable to use *Seriously Amazing*?

Any offer or communication that will bear the *Seriously Amazing* tagline needs to earn that banner. It is not enough simply to say something is *Seriously Amazing*, it must be *Seriously Amazing*. The purpose of the tagline is to get people to see the Smithsonian in a different way, so it should be associated with communications and offers that will help to make that happen. Therefore, before it can be used, units should assess whether the intended use meets the objectives of the brand strategy. The questionnaire assists in this assessment. A superlative example of when the tagline may be used would receive a YES answer to all of the questions below:

If <i>Seriously Amazing</i> is to be used in association with an offer (e.g, exhibitions, public programs, online experiences, events, products or services):			
BRAND GUIDELINE	QUESTIONS TO CONSIDER	YES	NO
Create a transformative idea or experience	Will this offer help people discover something new about themselves or their worlds?		
	Will it change the way people feel about something?		
	Will it change the way people think about an idea?		
Inspire and invite participation	Will this offer allow people to use our knowledge to create their own learning experiences?		
	Does it ask enable us to ask questions and/or engage in a dialogue with our audiences?		
Connect across ages, spaces and places	Does this offer make connections between disciplines and/or Smithsonian units and/or outside partners?		
	Will this offer enable people who can't visit Smithsonian in person to experience us in another way?		
	Can this offer appeal to people of all ages and backgrounds?		
If <i>Seriously Amazing</i> is to be used in association with a communication (e.g., websites, publications) those communications should be describing offers that meet the criteria above <u>and</u> :			
BRAND GUIDELINE	QUESTIONS TO CONSIDER	YES	NO
Tell stories and ask questions	Does this communication share our knowledge in narrative form?		
	Does it put a face on the Smithsonian and share our personal stories with people?		
	Does it encourage people to contribute their own stories and questions?		
Talk with people, not at "the public"	Does this communication take into account the individual interests and preferences of the intended audience?		
	Does it use a tone of voice that is accessible, energetic, inviting?		
	Does it reflect our expertise and authority without being impersonal or condescending?		
Offer infinite options to explore	Does this communication offer the opportunity to learn more?		
	Does it encourage the audience to explore within or beyond the Smithsonian?		

What are the rules for how the tagline *Seriously Amazing* should appear in text?

The tagline should always appear in conjunction with the Smithsonian name, should only be used in the approved font and visual identity (TBD) and should never be used in a sentence, but only as a stand-alone exclamation.

When can *Seriously Amazing* be used?

The use of the tagline will be launched in two phases

Phase 1 (October 2011-April 2012)

Following the internal launch of the brand strategy to staff in October, unit directors will have the discretion to use the *Seriously Amazing* tagline under the circumstances and in the manner described above. Use during this phase should be limited to exceptional uses only so as not to preempt the impact of the national advertising launch described in phase 2.

Phase 2 (April 2012- beyond)

In April 2012, the tagline will be featured in a national advertising campaign for the Smithsonian. Use of the tagline in advertising will expose a broad range of audiences to *Seriously Amazing*. After this exposure, the power and recognition of the tagline will increase and thus it can be used more frequently, but still in accordance with the guidelines and criteria above.

Brand Guidelines

Exciting the Learning in Everyone: PEOPLE

Definition:

PEOPLE: The actions and attitudes we want to encourage and reward in our people

Examples of what this is/where it lives:

- Recruitment
- Performance Evaluation
- Management Style
- Workplace culture

What to keep in mind:

- **Celebrate what is special about the Smithsonian**
 - What is special about your unit that others at Smithsonian, and in the world, should know?
 - What do you like best about working for Smithsonian? What do your colleagues and staff like best about working here?
 - Have you created opportunities for you and your staff to share what you love about Smithsonian with others?
- **Share your love of learning**
 - Are we collaborating across the Smithsonian?
 - Are we collaborating with our audiences?
 - Are we seeking out partners who can collaborate with us?
- **Bring the American spirit to life**
 - What can I do to embrace the American ideals of discovery, creativity and innovation?
 - How can I challenge my colleagues to try new things, learn new skills and challenge themselves on a daily basis?
 - How can we highlight these ideals in everything we do so our audiences can see it?

Exciting the Learning in Everyone: CAPABILITIES

Definition:

CAPABILITIES: The talents, skills, expertise and assets that make us special

Examples of what this is/where it lives:

- Research
- Collections
- Expertise
- Specialties & unique talents
- Outreach capacity
- Partnerships

What to keep in mind:

- **Lead through discovery and collaboration**
 - Where do we have opportunities to make new discoveries? What new discovery is within this project?
 - Are we taking full advantage of opportunities to work with others inside and outside Smithsonian?
 - What do we know/have/do that no one else can? How is that brought to life in this project?
- **Understand and grow your audiences**
 - Who are our audiences? What do they want? How do they want it?
 - What could we do to understand our audiences better?
 - Who aren't we reaching? Why? What can we do to change that?
 - How can we reach people locally, nationally and internationally?
- **Hook and engage with unexpected connections**
 - How can we make this project exciting and compelling and likely to grab someone's attention?
 - Have we looked around Smithsonian for ways to connect this project to other ideas and activities?
 - Are we serving as a universal lens and sharing multiple perspectives on something?
 - How is this project relevant to people's everyday lives?

Exciting the Learning in Everyone: OFFER

Definition:

OFFER: The experiences, ideas and products we put out in the world

What this is/where it lives:

- Discoveries & Ideas
- Exhibitions
- Education Programs
- Public Programs & Events
- Online Experiences
- Training
- Products/Services

What to keep in mind:

- **Create transformative ideas and experiences**
 - How can this offer help people discover something new about themselves or their worlds?
 - How can it change the way people feel about something?
 - How can it change the way people think about an idea?
- **Inspire and invite participation**
 - How can we encourage people to take the knowledge we give them and use it to create their own learning experiences?
 - Are we asking people enough questions and responding thoughtfully to their answers?
 - What can we do to help people continue the conversation outside the Smithsonian?
- **Connect across ages, places and spaces**
 - How can we make our unit/this project appealing to people of all ages, backgrounds and learning styles?
 - What can we do to help people who can't visit us in person experience what we have to offer?
 - How can we make connections between what we do and what other Smithsonian units do and/or what our partner organizations do?

Exciting the Learning in Everyone: COMMUNICATIONS

Definition:

COMMUNICATIONS: The way we talk about the Smithsonian, inside and outside

What this is/where it lives:

- Earned & Owned Media
- Websites
- Publications
- Speeches
- Correspondence
- Conversations

What to keep in mind:

- **Tell stories and ask questions**
 - How can we share our knowledge in narrative form?
 - How can we put a face on the Smithsonian and share our personal stories with people?
 - What can we do to encourage people to contribute their own stories and questions to the things we are doing?
 - How can we create dialogue with people?
- **Talk with people, not at “The Public”**
 - How can we create a tone of voice that is accessible, energetic, inviting and genuine?
 - How can we reflect our expertise and authority without being impersonal or condescending?
 - How can we engage with our audiences as individuals with their own interests, learning styles and needs?
- **Offer infinite options to explore**
 - What can we do to provide visitors with new opportunities for participation and engagement?
 - How can we make sure that they never hit a dead end and always have more opportunities for discovery?
 - How can we help people make connections between different parts of the Smithsonian? How can we encourage them to explore beyond the Smithsonian?