



Engaging in Social Issues

Padilla's Social Issues Scorecard

Companies and brands confronted with controversial issues used to strive to keep their heads down and “stay in their lane.” But many are now finding that customers, employees, communities and even some investors are expecting to hear their positions on important social issues. The following guidance and worksheet are intended to help companies and brands consider all relevant factors and respond in a way that follows their values and addresses the interests of their stakeholders.

OVERALL GUIDANCE

- 1. Resist jumping to conclusions.** Take the time to educate your team about the details of the issue. This type of decision should be made after careful consultation with leaders in the organization that touch the different audiences you serve.
- 2. Start with the end in mind.** What is the ultimate objective you are looking to achieve?
- 3. Transparency, authenticity and humility are key.** These are difficult issues, and it's okay not to have clear-cut answers.
- 4. Consider the long-term.** What you say today needs to be something you can commit to in the future.
- 5. Focus your communications.** A highly targeted approach directed at precisely the right stakeholders can be just as effective as broad-based proclamations.
- 6. Align words with actions.** “Support” should include tangible ways in which the company and brand is responding.
- 7. Stay flexible.** Situations and sentiment change, so be sure to evaluate your messaging to ensure it's being considerate of current context.
- 8. In the midst of crisis, there is opportunity.** This can be a time to reinforce values and initiatives already in place, as well as institute meaningful new initiatives.
- 9. Get outside perspective.** You're not alone – consult with peers and your outside PR counsel and learn from their experiences.
- 10. Plan ahead.** Take time to anticipate what is coming and use the scorecard below to think about how you would respond should an issue arise.

SOCIAL ISSUES SCORECARD

This worksheet is designed help leadership and the issues management team consider all of the possible dimensions of an issue before determining whether it's appropriate to engage in the discussion. It takes into account the following factors:

- Impact on key target audiences
- How the issue will impact different locations
- How the issue aligns with an organization's mission and values
- Understanding the motives of others calling for you to act
- Exploring the impact your voice will have on the issue
- Who will take the lead in communicating the organization's position, and why?
- How can participation benefit the organization?

The scorecard should be used as a guide and does not replace the need for judgement on a case-by-case basis.

Demonstrated Due Diligence

- Have we reviewed the details around the issues involved?
- Have we consulted external experts to bring clarity to the issue?
- Have we reviewed past incidences of similar issues?

Commentary

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DEFINING RISK AND RELEVANCE: IMPACT OF THIS INCIDENT/EVENT ON STAKEHOLDER GROUPS

Rate the potential impact the issue will have on our relationship with stakeholders and our business.

	No Impact (1)	Low Impact (2)	Neutral Impact (3)	Some Impact (4)	High Impact (5)
Customers					
Employees					
Benefactors					
Community leaders					
Prospective customers					
Partnerships and business relationships					
Total					
Grand Total					

Demonstrated Due Diligence

Is it relevant to all locations, just one or a few?

Is it a bigger issue/concern in one site for some reason (proximity, population served, etc.)?

Commentary

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DEFINING ALIGNMENT WITH MISSION AND VALUES AND APPROPRIATENESS OF RESPONSE

Rate the alignment of this issue to mission and values.	No Alignment (1)	Low Alignment (2)	Neutral Alignment (3)	Some Alignment (4)	High Alignment (5)
Mission					
Values					
Total					
					Grand Total

Demonstrated Due Diligence

Does our mission compel us to respond?

What, if anything, are we being asked to do (i.e., Lend our voice/name? Participate? Lead? Convene? Offer support? Offer resources?) And by whom? What are their motives in getting you engaged in this issue?

Commentary

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ASSESSING CREDIBILITY, TIMING AND STRATEGIC FIT

Evaluate key considerations for responding to this issue.	No (1)	Low (2)	Neutral (3)	Some (4)	Yes (5)
Are we a credible authority on this topic? (i.e., Do we have a subject matter expert? Doing relevant research? Or are we an authority due to another hat that we wear, such as the largest employer, for example?)					
Is this issue both timely and relevant?					
Does this tie to our strategic objectives?					
Does our company already have internal champions for this issue? Or, do we have the ability to develop/appoint a champion?					
Will this issue gain broad national exposure?					
Will this remain an important issue for years to come?					
Will declining to respond have a negative impact on our business and culture?					
Does an earlier statement on this topic compel us to respond again?					
Total					
				Grand Total	

Demonstrated Due Diligence

Do we already have a well-articulated point of view?
 Have other well-respected organizations responded?
 Have other peer organizations responded?
 Review prior statements that may have been made about this topic.

Commentary

EVALUATING ALIGNMENT WITH COMMUNICATIONS OBJECTIVES AND POTENTIAL BENEFITS TO RESPONDING

Rate the potential benefits of responding to this issue.	No Benefit (1)	Low Benefit (2)	Neutral Benefit (3)	Some Benefit (4)	High Benefit (5)
Establish thought leadership?					
Help to engage customers/consumers in new and more relevant ways?					
Increase stakeholder engagement?					
Strengthen relationships with communities where we live and work?					
Strengthen relationships with our employees in order to build stronger culture within the company?					
Total					
				Grand Total	

Demonstrated Due Diligence

Is the decision by senior leaders unanimous or split?
 What is the advice of outside counsel?

Commentary

Scoring

	Grand Total
0-76	The issue is not a good fit – not relevant enough for the organization.
77-98	The issue may be a good fit – consider whether communications should be internal and/or external.
99+	The issue is a very good fit – an opportunity to establish leadership or compelling need to have a public position.

If you decide to move forward with a statement, be sure to focus messaging in the areas that scored highest on this evaluation. Focus those comments on the most relevant audience and define the outcome you hope to achieve. While some may want to hear from you immediately, a well thought out approach and statement is often more important than speed.