**Table of Contents**

1. Executive Summary ........................................ Page 1
2. Organization, Structure and Management ................. Page 4
3. Internal Communications ........................................ Page 6
4. Communication to Decision Makers .......................... Page 9
5. Media Relations ................................................... Page 11
7. Multimedia Production and Publications ...................... Page 15
8. Web and Social Media .......................................... Page 17
9. Community Relations ........................................... Page 19
10. Appendices
    A. Charge to the InterAction Collaboration ............... Page 21
    B. Peer Review Committee .................................. Page 23
    C. Peer Review Agenda ....................................... Page 25
1. Executive Summary

The InterAction Collaboration conducted a peer review of Fermilab’s Office of Communication on July 15-18, 2014 at the request of laboratory Director Nigel S. Lockyer (Appendix A). To perform the review, the InterAction Collaboration convened a committee of seven members (Appendix B) including communications and media experts from the United States and Europe.

The review was sought to assess the mission, organizational structure, and management of Fermilab’s communication activities, particularly in light of the new ten-year plan for particle physics projects funded by the DOE and NSF and, more pointedly, the recent restructuring of senior management, including a new Director and Chief Operating Officer.

After extensive presentations and discussions with senior management, the Office of Communication, various internal groups, DOE officials, international press, and the Fermilab Community Advisory Board (see Appendix C), the Panel delivered its final reports at a closeout that included Fermilab Director Nigel S. Lockyer, Chief Operating Officer Tim Meyer, and DOE Fermi Site Office Manager Michael Weis.

The Panel found lab management to be open, welcoming of change, and appreciative of the quality of Fermilab’s talented, dedicated and skilled communication and education staff. Fermilab’s future is bright and brings forward new challenges, for example: the lab faces significant staff turnover over the next decade; the development of the Illinois Accelerator Research Center may demand more state relationship-building resources in the coming years, and particle physics priorities are being refined at the national level.

Three central themes emerged over the course of the review. First, the laboratory lacks an overall Strategic Communications Plan, including priorities that align with the vision of senior leadership, related metrics, and an overall brand strategy. Second, laboratory management must carefully consider how to distinguish various audiences, like its user community, in order to appropriately select a channel for communication. The third theme calls for appropriate technology solutions for communications needs. The lab has fallen behind modern online communication practices and needs a deliberate strategy to leap forward on web site platforms.

Laboratory management must charge the Head of Communications to develop a Strategic Communications Plan to support Fermilab’s mission, develop a brand, and set priorities and metrics. The plan should include input from select units, including workforce planning to ensure the development of the lab’s brand reflects the lab as an employer of choice. With new management in place, there must be a definition of responsibilities between the CEO, COO, and the Head of Communications, especially in the area of government relations and overall reputation management. There is significant overlap between the missions of the communications function, especially community relations, and the Education office. Laboratory management should re-examine this area with a view to maximizing potential synergies and return on investment. The Office of Communications should be given the authority and the tools to communicate directly with supervisors in functional areas to improve accountability for the lab’s internal communications processes.
The Office of Communication requires appropriate, modern tools to effectively segment its audiences, craft communications strategies for each, and measure effectiveness. All internal and external communications must be fully aligned with the Strategic Communications Plan so that resources are allocated to the highest priority. It is critical to identify various audiences so that appropriate channels facilitate the right message. *Fermilab Today* is defined as the primary internal communication mechanism to its 1,700 staff but is also received daily by 4,500 external subscribers. This daily newsletter requires significant resources from the Office of Communications and is using outdated technology that does not allow for tracking and metrics, and it is attempting to serve multiple audiences. **The committee strongly recommends ceasing *Fermilab Today* in lieu of developing an intranet for communicating with internal audiences and the development of relevant communications tools for external audiences.**

Fermilab’s joint publication with SLAC, *symmetry* magazine, has nearly 30,000 online and print subscribers. *Symmetry* is highly valued as a mechanism for communicating the larger story of the discipline to a broad and growing audience, often key decision makers.

The Office of Communication is active in building and maintaining local government relations. However, there are no staff resources designated to support state relations. With the Illinois Accelerator Research Center, these relationships will be increasingly important. **There is no strategy guiding decision maker communications and the Panel strongly recommends appointing a government relations professional to manage state, congressional and influencer relationships.**

Similarly, the Strategic Communications Plan must consider the prioritization of national communications support efforts within the overall communications function. If this effort remains a high priority, management should work with the DOE and NSF to ensure it is resourced as a core function.

Earlier this year, the P5 Report presented a strategy for the next decade of particle physics in the US, setting ambitious goals for Fermilab’s science program. Communicating the P5 vision, and the lab’s role within it, to the widest possible group of stakeholders should be prioritized, with a special focus on the national and international particle physics community.

Fermilab enjoys positive name recognition and reputation, in part due to the quality of its media work nationally and internationally. Although only half of Fermilab’s media relations are proactive, the Panel found that the Office of Communication provides well-crafted packages for media. **The Panel proposes a number of strategic implementations to further bolster laboratory efforts, including media training for senior management, outsourcing services that provide media tools, and better leveraging of the InterAction Collaboration network.**

The Video and Multimedia Services group provides a wide range of services to the laboratory and sections of the broader science communities with a range of in-house and external suppliers. The Strategic Communications Plan should clearly identify requirements from VMS with strategic alignment with institutional priorities, noting that this may require VMS to cease some services and modify others.

The Office of Communication faces many technological barriers. Management support must be provided to ensure IT solutions appropriate for communications needs. **The Panel recommends**
that a web governance structure be defined by lab management with clear responsibilities for the Office of Communications, including consistent branding, content, and functionality. Social media guidelines and training should be introduced internally in order to reduce reputational risk. The modest input of resources currently yields positive returns for social media; however, goals and metrics must be defined.

During the unfortunate Tritium leak in 2006, the Office of Communication remained transparent and engaged with its neighbors. To ensure future success with crisis and community communication, the Office must finish its Crisis Communication Plan, folding in input from the Community Advisory Board. The Community Advisory Board is a strong asset for Fermilab and its members value their role. The Office should seek opportunities to engage local members of the technology and business community, and leverage the Community Advisory Board in order to gain local support.
2. Organization, Structure and Management

Findings

• The Panel found lab management to be open and welcome to embrace change. They demonstrated an awareness of the communications and reputational issues facing the lab and its staff. The Panel was particularly pleased with management’s recognition of the quality of the Fermilab’s talented, dedicated and skilled communication and education staff.

• Responsibility for communicating the operations and outcomes of the lab is shared by a number of units, depending on the specific audience – for example, the Users Office, Education Office, Communications, Computing Sector Communications Group.

• The laboratory lacks an overall Strategic Communications Plan, including appropriate metrics.

• The July restructuring places responsibility with the COO for the related functions of Education and Communications.

• Fermilab has developed a campus master plan, incorporating the Illinois Accelerator Research Center designed to translate accelerator developments into applications.

• Fermilab faces a significant staff turnover over the next decade, at a time of shifting priorities.

Comments

• Although the Panel is satisfied that the individual units do share information and seek to collaborate fully, it was also made clear that authority for overall communications is uncertain and that the Head of Communications operates under implicit rather than explicit authority in relation to overall reputational management.

• The lab has not formulated a single clear strategic narrative, identity or brand. The distributed nature of responsibility for communications further hinders the development of this brand.

• Many staff in communications and related functions identified to the Panel a desire for clearer strategic direction to inform and empower their efforts. On issues ranging from the level of stakeholder engagement to the choice of appropriate technologies, the Panel found the lack of a strategic plan was holding back necessary change. The Panel recognizes that the lab has been in a transition period with a new director, mission, and senior management team, and commends the Office of Communications for continuing to produce high quality output throughout this transition period. However, progress on a
Strategic Communications Plan is urgent if the lab is to fully communicate its new mission and objectives to key stakeholders in a timely manner.

- There is significant overlap between the missions of the communications function, especially Community Relations, and the Education office. We found areas of potential additional synergies between the two functions.
- The Panel notes that there is less than one FTE that translates to a true communications function in the Computing Division. Further, the majority of this FTE time is spent on technical communications appropriate to computing. The Panel heard from both the Office of Communications and Computing that this effort is well coordinated.
- The future development of IARC may pose both opportunities and challenges for the Communications office.

**Recommendations**

1. Laboratory management should urgently confirm the authority of the Head of Communications as responsible for overall reputational management.

2. Laboratory management should charge the Head of Communications to urgently develop a Strategic Communications Plan to support the current Mission, develop a brand, and identify appropriate metrics and timeframes. The Head of Communications should be charged to work with all organizational units to carry out the Strategic Communications Plan.

3. Laboratory management should reevaluate the Offices of Communications and Education to maximize synergies.

4. In formulating the Strategic Communications Plan, the Head of Communications should include input from workforce planning to ensure the development of the Lab’s brand proposition reflects the need for the lab to be seen as an employer of choice.
3. Internal Communications

Findings

• In the last two years, the Office of Communications has devoted more resources to internal communications with the addition of 1 FTE dedicated solely to this function.

• Communications has multiple channels devoted to internal communications, including Fermilab Today, Fermilab at Work, all-hands emails, and all-hands meetings. The computing division also communicates with its employees through a department newsletter, the only one in existence at the Lab.

• Fermilab Today and Fermilab at Work are also accessible to external audiences, and in fact, are read more by non-employees than employees, sometimes by a factor of 10 to 1.

• There is no clear policy as to which channel should be used to communicate which types of news.

• An emergency management plan is in place that outlines a protocol for communications in case of emergencies, but no overarching crisis communications plan exists.

• An employee advisory group is in place and appears to provide valuable feedback to Communications and laboratory management.

• The output of a daily newsletter, Fermilab Today, requires significant resources from the Office of Communications. One FTE is required to create and send out the newsletter and multiple writers contribute to its content. In addition, Fermilab Today is created using HTML, a cumbersome tool that does not allow for metrics regarding readership.

Comments

• The Office of Communications should be commended for recognizing the need to focus more resources on employee communications, and ensuring that employees are not only kept informed of workplace issues, but are also kept abreast of important scientific and lab news and understand the lab’s messaging and narrative. This is critical if they are to serve as ambassadors for Fermilab as it begins a new chapter in its history.

• There appears to be a great deal of confusion and setbacks with regard to the use of technology in facilitating employee communications. The panel heard multiple times that certain best practices with regard to differentiating audiences and speaking solely to employees – or subsets of employees, such as supervisors – are not possible in part due to lack of modern technologies. For example, it is unclear whether particular listservs could be created to allow for communications to certain internal audiences. In addition, it appears the lack of a proper content management system for creating a robust external web presence, and possibly an intranet, has significantly hampered efforts to improve internal communications on multiple fronts.
• There is also confusion as to how users should be categorized. There appears to be no policy for whether users should be treated as employees for communications purposes, or whether different users should receive different types of information based on the length or depth of association with the laboratory (long term or one-time user, on site or off site, etc.)

**Recommendations**

1. There is an urgent need to evaluate the technology strategy that would enable more effective and efficient internal communications. The technologies currently used in house for the delivery of communications, such as an HTML newsletter, are considered antiquated and consume human resources that could best be used elsewhere. Communications should have the tools it needs to effectively segment its audiences, craft communications strategies for each, and measure audiences and effectiveness.

2. The Strategic Communications Plan should prioritize the creation of an intranet in order to allow for specific, transparent internal communications without having to be sensitive to issues in writing for a broader audience and to facilitate two-way communication. Best practices with regard to technologies should be evaluated for implementing an intranet, i.e. what is the most efficient Content Management System.

3. In conjunction with an intranet, *Fermilab Today* needs to be reevaluated, from an audience, technology and resource perspective. It is using outdated technology that does not allow for tracking and metrics, and tries to serve multiple audiences. The efficiencies in resources could be redeployed for higher priority communication needs. At a minimum, if the decision is made to continue *Fermilab Today* in its current format, i.e. as a daily newsletter, more modern technologies that are less time intensive to produce and allow for metrics should be urgently explored.

4. A strategy should be put in place as to what channel is used for communicating which type of information to internal audiences. Currently, the panel heard that if a certain piece of information is considered mandatory for employees to know, that information is shared via an all-hands email. Otherwise, the channels of *Fermilab Today*, Fermilab at Work and others are used interchangeably. This must be addressed so internal audiences know where to go to get which types of information.

5. The issue of whether users should be treated as employees for communications purposes, and what communications they should expect to receive from the laboratory, should be clarified. This has certain implications currently, such as whether they are invited to all-hands meetings or whether they should receive all-hands emails, but will become a more urgent issue in the future as communications becomes more targeted for Fermilab’s different audiences, and if an intranet is created.

6. A comprehensive Crisis Communications Plan should be created.

7. The role of managers in communicating with employees, cascading communications down, and serving as conduits of internal communications must be clearly stated. It does not
appear that managers are trained or held accountable for making communications part of their responsibility. This accountability should be made explicitly clear, and communications training for supervisors should be considered. The Office of Communications should be given the authority and the tools to communicate directly with supervisors, and to help them become an integral part of the lab’s internal communications infrastructure.

8. With 56 percent of the workforce within 10 years of retirement age, it must be a top priority to shape strategic internal communication strategies and tactics that support recruiting and retention. Employee surveys, such as through Great Places to Work, will be important as will exit survey data to understand strengths and deficiencies in the workplace culture. It will not be sufficient to simply provide communications to help “complete work in an efficient and effective manner.” New approaches to motivate employees and inspire pride in the lab will be needed.
4. Communication to Decision Makers

Findings

- The Office of Communications is active in building and maintaining local government relations.

- Based on presentations, there seems to be no relationship-building effort with state government officials and no staff resources designated to support state relations.

- The Office of Communications is regarded as a valued resource by Congressional staff, even if the DC relationship is primarily managed by a lobbying firm. The firm keeps in close contact with the Office of Communications and is seen as adding value.

- The annual users’ executive group meeting in DC is perceived by leadership as “unparalleled” in helping with Congressional access. (300 visits to congressional offices)

- The Office of Communications helps shape messaging and materials for congressional visits – both in DC and at the Lab. Confidence was expressed by senior leaders in these products.

- The Office of Communications often distributes news releases to decision makers, but this is not systematic.

- There is a Congressional Detailee to Rep. Randy Hultgren’s DC Office. This position is ending July 28th.

- The panel was told there is no strategy guiding decision maker communications.

Comments

- Local government: Even though this is actively managed, it will be important to find ways to gauge effectiveness.

- State government: With the Illinois Accelerator Research Center, the state relationships will be increasingly important.

- Congressional: There has not been a recent formal evaluation of the lobbying firm’s effectiveness.

- Influencers: Of user groups, we heard there is an opportunity to better engage users as ambassadors for the lab.

- VIP visitors: Based on sample VIP tour, Fermilab’s value proposition and the benefit to society of the science performed here – to justify taxpayer investment – did not come across.

- Influencers: Other than cultivation of relationships with users, there is very limited apparent relationship building with “influencer” stakeholders. Exception: Membership in
the Illinois State & Technology Coalition but it’s not clear whether the Lab is actively involved.

- **Influencers:** Business and regional economic development coalitions and/or other community leader coalitions can be powerful voices on Capitol Hill. This is a gap/opportunity.

**Recommendations**

1. With new management in place, there needs to be a clearer definition of responsibilities between the CEO, COO and Head of Communications, who will be responsible for relationships and touch points with which decision makers at various levels as part of a decision-maker strategic plan.

2. Revisit community leaders survey (last one done in 2000) with stakeholder segmentation to learn how the Lab is perceived by local officials, the business community, educators, and others.

3. Based on sample VIP tour, refine strategic messaging – in presentations and visuals – to convey value proposition and benefit of Fermilab science to society.

4. Evaluate effectiveness of the lobbying firm, perhaps in coordination with the University of Chicago federal relations office.

5. Shape a strategic stakeholder relations plan to cultivate relationships with “influencers,” including regional business and community leaders.

6. A system should be developed and implemented to ensure consistent distribution of strategic news releases to decision makers.

7. Be more proactive in engaging with local, state and congressional officials through strategic constituent opportunities. Examples: photo ops with STEM programs in key districts, letters from school principals (or superintendents) in key districts.

8. Appoint a government relations professional to manage state, congressional and influencer relationships to include identifying key constituent-related congressional opportunities.
5. Media Relations

Findings

• Fermilab has 0.5 FTE dedicated to handle all media relations.

• Most press office functions are done in house, with the exception of the use of Meltwater for media monitoring.

• Many journalists praise the Fermilab press office.

• A lot of attention is placed on local media. National and international media are approached in an undifferentiated way.

• Fermilab personnel give interviews without necessarily informing the Office of Communications, or having received media training.

• Media coverage is mainly in the US, however the Panel notes positive recent coverage in major international news outlets, such as the Economist and BBC.

• Fermilab’s media relations are 50% reactive, 50% proactive.

• The Office of Communication puts emphasis on the quality rather than quantity of media, putting together well crafted packages for media outlets.

Comments

• If Fermilab wishes to develop a stronger international presence, a more proactive approach to media relations, and to deploy media relations in support of the strategic aims of a laboratory that is about to embark upon a major international project, 0.5 FTE is insufficient.

• There are many companies offering press office management services, like contact management, press release distribution, and media monitoring that could inform strategy and relieve duties from the Office of Communications.

• National and international messaging and tactics are not well differentiated.

• Fermilab has very good international connections through the InterActions collaboration, which could be better leveraged.

• There seems to be more emphasis on stressing strategic strengths to national and international media than to local media.

• STEM education coverage is not strategic.

• There is a reputational risk in allowing Fermilab personnel to give media interviews without adequate training. There is an opportunity to generate stronger coverage by offering training.

Subcommittee Members

James Gillies (Lead)
Jeremy Manier
• Proactive media relations seems mostly limited to press releases and events.

Recommendations

1. Realign communications resources to prioritize media relations in support of Fermilab’s strategic goals.

2. Consider using press office management services for contact management, press release distribution and monitoring.

3. Develop specific tactics and messaging for local, national and international media, and appropriate metrics.

4. Make better use of the InterActions collaboration to tailor and deliver Fermilab news with greater impact internationally. For example, advance distribution would enable international communicators to adapt news releases for their markets.

5. Fermilab should be promoted as a global center of excellence in local media relations as well as to national and international audiences.

6. Develop a local media strategy to spotlight STEM education initiatives.

7. Provide general media training programs for personnel, encourage a culture of liaising with the press office, and provide one-on-one media training for all members of senior management.

8. Cultivate more relationships with national/international reporters and actively pitch stories that are outside news releases or events.
6. User Communication and Support for National and International Communication Efforts

Findings

- Fermilab has 4,000 registered users. Fermilab employees can also be users. The users play different roles at Fermilab spanning full participants of lab activities to offsite users who take advantage of computing resources.

- The Office of Communications provides communications advice and a range of services to the US national particle physics community. In addition, the Office states that it plays a unique role as a representative and advocate for the discipline in the US, and globally.

- The lab has ambitious goals based on the P5 report. The Panel heard that communication between the laboratory and the wider national and international particle physics community was generally – but not always – good.

Comments

- Fermilab’s user community is and has been unique amongst other labs in its relationship to the lab and its activities. The Panel heard that there are some tools for communication to users at the lab and that these were not fully effective. There is a lack of clarity for responsibility of user communication, which is affecting output and effectiveness. However, the Panel was more concerned with the apparent confusion about the positioning of users within the wider Fermilab “family” – i.e. should they be communicated to as employees, or as external users.

- The Panel was presented with evidence that the national particle physics community gets value from the lab’s communications services and that the Department of Energy and international collaborators routinely interact with the Office – and especially the Head of Communications – as representatives of the discipline. The Panel carefully considered the apparent need for this role, and concluded that the lab’s communications staff should be congratulated for their efforts to date. However, the Panel is concerned that this role is not formally acknowledged.

- The Panel recognizes that the Office of Communications holds as a high priority the communication of the future vision of the lab to all stakeholders. The Panel also acknowledges that laboratory management is committed to broad engagement so as to secure national and international support for the P5 goals. The Panel feels that significant effort is required to achieve this.
Recommendations

1. Lab management should define the role and relationship of Fermilab users to the laboratory in order to define appropriate communication to this group and/or subgroups. The tools needed to communicate with users should be maintained or updated as required.

2. Within the context of the development of a Strategic Communications Plan, laboratory management should consider the prioritization of national communications support efforts within the overall communications function. If the lab concludes that this effort remains a high priority, the Panel recommends that management work with the DOE and NSF to ensure it is resourced as a core function.

3. Communicating the P5 vision, and the lab’s role within it, to the widest possible group of stakeholders should be prioritized. There should be a special focus on the national and international particle physics community.
7. Multimedia Production and Publications

Findings

- Fermilab Today (FT) is defined by the lab communications staff as the primary internal communication mechanism to Fermilab’s 1,700 staff, but is also “pushed” to 4,500 external subscribers. The Panel was told FT requires 2.5 FTE to produce on its current daily schedule. FT is produced as a hand-coded HTML email newsletter.

- The lab’s joint publication with SLAC, *symmetry* magazine, has an online subscriber base of more than 16,000, and an additional 13,000+ print subscription, with a broad audience age range. Fermilab’s share of production costs is a significant portion of the office’s overall budget.

- The laboratory has introduced visual branding guidelines. Older publications and signage are slated to be replaced.

- VMS provides a wide range of services to the laboratory, and to sections of the user and broader science communities. It uses a range of in-house staff and external suppliers. The Panel was not given evidence of a strategic plan guiding the operations of the group.

Comments

- The Panel was told, that based on responses to a 2012 survey, there are no plans to vary the FT production schedule. However, staff acknowledge that there could be alternate options. The current format of FT does not allow the Office of Communications to capitalize on the relatively large subscriber base by embedding links to hosted stories, and to thus better track reader’s interests and tailor material accordingly. The Panel also heard from external users and community representatives that, while FT was read, its remit was unclear – some of the material was irrelevant to external users. Current FT design parameters are inconsistent with the new lab visual style guidelines, and there is a risk that its appearance may become detrimental to the lab’s overall future brand. There is a perception that changes to FT would be resisted by sections of staff and external subscribers.

- The Panel received strong external feedback from members of the global particle physics community that *symmetry* is highly valued as a mechanism for communicating the larger story of the discipline to a broad and growing audience – often important decision makers. Its design was revamped in the past few years, and presents a modern, engaging and vibrant face for the lab and the discipline. The Panel commends the production team for their work, and notes that the online format allows not only Fermilab and SLAC, but national and international labs, to maximize the impact of content through social media and web cross-postings. *Symmetry* has become in its new format an even more valuable...
searchable online resource for the entire particle physics community and the science-interested public.

- The Panel commends the VMS staff for striving to continuously update the lab’s technological capabilities, and for their positive customer service attitude. However, the Panel feels that VMS is offering some services that could be provided by other units or externally. In addition, the team is reactive and acknowledges this fact – indeed, the head of the service noted that long-term (proactive, strategic) projects are consistently outsourced and that in-house resources are devoted to tactical service delivery. The relationship between VMS and the wider Communications Office appeared generally good, but the Panel questioned the degree of VMS strategic alignment with institutional priorities.

**Recommendations**

1. Lab management should ensure that all internal and external communications are fully aligned with the Strategic Communications Plan, and that resources are allocated to the highest priority. The Panel recommends that FT not continue in its present form. A revamped and refreshed internal communications program, including an intranet, should serve its internal audience. Communication to its external audience should be reassessed.

2. Symmetry is working well, and the Panel recommends that the online version be maintained its current format subject to regular positive feedback from reader surveys. The Panel acknowledges the potential impact of the print edition but recommends the two labs continue to re-assess the cost-benefit of the print edition.

3. The Strategic Communications Plan should assign resources to ensure consistent visual identity across all media.

4. The Strategic Communications Plan should clearly identify the requirements from VMS, noting that this may require VMS to cease some service offerings and modify others.
8. Web and Social Media

Findings

- There is no clearly defined web governance structure.
- Lack of in-house expertise and resources has led to extensive use of outside contractors.
- The lab does not have an intranet. Web-based internal communications are done through Fermilab Today, Fermilab at Work, and internal emails to an all-hands listserv.
- Fermilab does not have a Content Management System. All pages are coded in HTML.
- The home page and other high ranking web pages on the Fermilab site were recently redesigned to modernize the look, emphasize the brand, and make a clearer presentation of Fermilab’s offerings. The redesign has not been User Interface (UI) tested.
- Fermilab is active on three main social media channels: Youtube, Facebook and Twitter, and has a strong presence on all with steadily growing audiences.
- Fermilab has no internal social media guidelines.

Comments

- Clarity is needed in web governance. There are divergent views across the laboratory as to where responsibilities lie. The Office of Communication doesn’t have complete control over the consistency of departmental web pages. Strategic use of both in-house and contracted web development requires clarity of roles and channels of communications between IT, contractors and the Office of Communication.
- While the redesign of the Fermilab website is an improvement, and its implementation across Fermilab pages would bring cohesion and clarity of brand, the lab remains a decade or more behind modern online communication practices and needs a deliberate technology strategy to leap forward on web site platforms.
- With the volume of content created by the Office of Communications, the staff time devoted to webpage HTML layout could be strategically used to further the mission and vision of the lab. Hand coded pages also limit the ability of the Office of Communications to appropriately place Fermilab news through strategic Search Engine Optimization and tagging.
- Social media presence on Youtube, Facebook and Twitter is good given the very modest investment of time. With a new resource coming on board, there is an opportunity to be more strategic. Goals for social media outcomes (not just outputs) need to be defined. For example, increasing engagement with particle physics community, increasing visitors to the lab site, increasing media coverage, etc. Additional synergy with the community outreach programs at the lab would improve social media visibility.

Subcommittee Members

Chelsea Whyte (Lead)
James Gillies
• The ability to tailor messages to internal or external audiences should be improved through the use of separate communications channels, potentially including the use of an intranet for employee and user-appropriate information such as HR notices, internal messages from the Director, site-specific announcements, etc.

• Lack of social media guidelines leads to reputational risk.

Recommendations

1. Deploy a web governance structure with clearly defined responsibilities for the Office of Communications, which would include branding, content and functionality.

2. Management support, critical to ensure IT solutions appropriate for communications needs, must be provided.

3. Introduce an intranet.

4. Guided by a Strategic Communications Plan, continue to roll out consistent redesign across the site while implementing UI testing.

5. Deploy a Content Management System for streamlined online publication and targeting of messages.

6. Develop a social media strategy that appropriately leverages the outreach programs and thousands of visitors to the lab each year.

7. Develop social media guidelines, and offer social media training.
9. Community Relations

Findings

- Fermilab’s Community Advisory Board (CAB) meets six times per year. CAB members value the opportunity to learn about and help the lab. “There’s an aura here that’s magical.”
- The Education Office and the Arts and Lecture Series reach wide audiences with diverse programming, offering additional potential channels for community contact.
- Magnet arrival party drew 3,000 people, energizing supporters.
- There has been no survey of community leaders since year 2000.

Comments

- Although CAB members agree with staff that Fermilab does not have significant community opposition, their feedback suggests work remains. They note that Fermilab enjoys high name recognition and respect, but understanding and support of its research agenda and community benefit is low.
- Community relations’ efforts do not appear to include outreach to businesses or significant presence at outside community events.
- The staff’s assessment of impact from community relations, Arts and Education programs could benefit from deeper use of metrics, beyond attendance numbers. Education outreach is potentially profound asset to the lab, but tools to measure its success and influence are not in evidence.
- The committee noted the transparency and open communication during the 2006 Tritium leak.

Recommendations

1. Make concerted effort to align major avenues of community outreach with Fermilab’s strategic priorities. For example, reinforce priorities at well-attended lecture events through brochures, video presentation, etc.
2. Conduct a new community leaders survey.
3. Develop more thorough metrics of Arts and Education programs.
4. Explore opportunities to bring Fermilab name and activities out to new settings to reach new community audiences.

Subcommittee Members

Jeremy Manier (Lead)
Bonnie Fleming
5. Seek ways to activate business and technology community and illustrate Fermilab’s benefits for economy and workforce. For example, leverage esteem for Fermilab’s brand by hosting networking event for local STEM workers & employers.

6. Claim more credit for existing strengths. For example, track schools that visit lab or benefit from programs, and send letters to relevant congressmen and other elected officials conveying attendees’ positive feedback and impact of programming.

7. Finish the Crisis Communication Plan, including communication to the community, folding in input from Community Advisory Board.
10. Appendices

Appendix A – Charge to the InterAction Collaboration

Fermilab

Nigel S. Lockyer
Director’s Office
630.860.3211 - office
630.333-5984 - cell
Lockyer@fnal.gov

May 2, 2014

Dr. Yoshihisa Obayashi
Kavli Institute for the Physics and Mathematics of the Universe
Tohoku Institutes for Advanced Study,
The University of Tokyo
5-1-5 Kashiwanoha
Kashiwa 277-8583
JAPAN

Dear Dr. Obayashi,

I would like to invite the InterAction Collaboration to conduct a peer review of our communication function at Fermilab. This year is pivotal both for Fermilab and for the U.S. community, with the publication of a new ten-year plan for particle physics projects funded by the U.S. Department of Energy and National Science Foundation. Fermilab is now the only laboratory in the DOE system dedicated to particle physics, which brings about new responsibilities for the laboratory and for its communication function.

It is imperative that Fermilab’s communication strategy, which also supports the national community, be prepared for the challenge of building support for the future of U.S. particle physics research and for the future of Fermilab. It is equally important that Fermilab’s communication strategy support a workforce that must adapt to changing scientific priorities and budgetary constraints, adapt to the needs of a changing user community, and engage our local community as partners in building the lab’s future.

With those goals in mind, I request that the review assess the mission, organizational structure, placement within the laboratory organization, and management of Fermilab’s communication activities, including the following aspects:

- A central vs. distributed communications function.
- Resources, including number and expertise of personnel and funding for materials and supplies.

I also request that the review focus on the following aspects of Fermilab’s strategic communication activities:

- Appropriateness of balance between support and promotion of laboratory activities and support and promotion of the activities of the broader U.S. particle physics community.
- Branding and promoting Fermilab to key audiences including decision makers, opinion leaders and members of the media in the context of the current U.S. scientific and funding environment.
- Effectiveness of the laboratory’s program to communicate to its employees and to its changing national and international user community.
- Effectiveness of Fermilab’s digital and multimedia communication efforts, including its web and social media presence.

While the review committee should take into account the interaction between the laboratory’s communication and education functions, educational activities should not be a focus of this review.
The review should take place in July 2014 as schedules permit. Fermilab will cover travel expenses for the review committee and provide local organizational support. Travel planning and logistics will be handled by Barbara Kronkow (+1 630 840 3351, kronkow@fnal.gov).

I have been impressed by the results of previous InterAction Collaboration peer reviews, and look forward to the results of your review of Fermilab.

Yours sincerely,

Nigel S. Lockyer
Director

Cc: Melissa Baluk, TRIUMF
    Tim Meyer, TRIUMF
    Kathryn Jepsen, SLAC
    Katie Yurkewicz, Fermilab
Appendix B – Peer Review Committee

Bonnie Fleming, Horace D. Taft Professor of Physics, Yale University (Chair)

Bonnie Fleming is leading the effort in neutrino physics at Yale University. Her research focuses on high energy neutrino physics to study the nature of neutrinos and what neutrinos can tell us about the rest of the Standard Model of particle physics and the universe. As a graduate student at Columbia University, Dr. Fleming studied proton structure by observing high energy neutrino-nucleon interactions at the NuTeV experiment at Fermilab. Following her Ph.D. work, she held a Lederman Fellowship at Fermilab working on the MiniBooNE experiment, searching for neutrino oscillations. Dr. Fleming is also the sub-group leader for the Science Collaboration proposing to build multi-kiloton LArTPCs for neutrino oscillation experiments observing neutrinos from Fermilab.

James Gillies, Head of Communications, CERN

James Gillies is Head of Communication at CERN, the European Laboratory for Particle Physics. He has a doctorate in physics from the University of Oxford, and began his research career working at CERN in the mid-1980s. In 1993, he left research to become Head of Science with the British Council in Paris. After managing the Council’s bilateral program of scientific visits, exchanges, bursaries and cultural events for two years, Gillies returned to CERN in 1995 as a science writer. He has been Head of the communication group since 2003, and co-authored ‘How the Web was Born’, a history of the Internet published in 2000 and described by the London Times as being among the year’s ten best books for inquisitive minds.

Farnaz Khadem, Director of Communications, SLAC

Farnaz Khadem joined SLAC as the Director of Communications in January 2011. Prior to that, she was with Life Technologies Corporation, a manufacturer of instrument systems used in genetics studies, where she served as senior director of corporate communications and public relations for four years. Before that, she led communications, media relations and public relations efforts in the life sciences at the University of California, Irvine, the World Anti-doping Agency and more. She has lived and traveled abroad extensively during posts with the U.S. Foreign Service Diplomatic Corps in Israel, Italy and Washington, D.C. She earned both a master’s and bachelor’s degree in journalism from Northwestern University.

Terry O’Connor, Head of Communications, STFC

Terry O’Connor has been Head of Communications and a member of the senior management team for the UK Government’s Science and Technology Facilities Council since August 2008. He is responsible for STFC’s external and internal communications, events, stakeholder and political relations and the Web. Terry began his career as a reporter with the national television network before realizing he had a face for radio and a voice for print. He became a political
correspondent in the Parliamentary Press Gallery in Canberra for 10 years with the Australian national wire service, culminating in an appointment as Chief Political Correspondent. In 1997, Terry accepted an offer from the Prime Minister’s Office to become Press Secretary and later senior policy advisory on the personal staff of a senior Cabinet Minister in the Australian Government. From 2001 to 2008, Terry held senior communications management positions with Australian Government public sector organizations and as the national press and public affairs manager for the British High Commission in Australia.

Jeremy Manier, News Director, University of Chicago

Jeremy Manier is news director at the University of Chicago. He oversees a staff that produces comprehensive communications for university news and research, including physical sciences, social sciences, humanities, law and policy. The News Office's recent communications projects have included the creation and growth of the Institute for Molecular Engineering, the affiliation between the University of Chicago and the Marine Biological Laboratory, and the effort to bring the Barack Obama Presidential Library to Chicago’s South Side. From 1996 to 2008 he was an award-winning science and medical reporter for the Chicago Tribune, where he covered subjects including stem cell research, bioethics, cosmology, the Columbia space shuttle disaster, and the search for the Higgs boson. He graduated magna cum laude from the University of Notre Dame with a B.A. in philosophy.

Lisa Rosendorf, Division Leader for Communications and Government Affairs, Los Alamos National Laboratory

Lisa Rosendorf has more than 25 years of experience in public relations, government affairs and community relations and currently serves as division leader for communications and government affairs at Los Alamos National Laboratory. Before coming to Los Alamos, she worked in New York for Ernst & Young, where she led a national public relations program to raise the firm's visibility in 13 targeted industry sectors. Rosendorf spent a decade with PG&E Corporation, where she managed public affairs strategies for power plants in development, construction and operation. She began her career at a leading public relations firm in Washington, DC, where she specialized in helping clients with environmental public relations and policy challenges. She has a bachelor's degree in Communications from Trinity University and has completed an executive leadership seminar at UC Berkeley Haas School of Business.

Chelsea Whyte, Public Information Officer, Brookhaven National Laboratory

Chelsea Whyte has been a Public Information Officer at Brookhaven National Laboratory for two years, working both in the Media Office for the Lab and as a deployed communicator for the Photon Sciences Directorate, which operates the National Synchrotron Light Source (NSLS) and NSLS-II. She has a background in science journalism and her expertise lies in social and multimedia storytelling. She previously worked for New Scientist magazine and she continues to write freelance science news articles.
Appendix C – Peer Review Agenda

InterAction Collaboration Peer Review
Fermilab Communications
July 15-18, 2014, Batavia, Illinois

Tuesday, July 15
5:15  Pick-up from Comfort Inn
5:30  Executive Session
6:30  Executive Session with Laboratory Director, Deputy Director and Chief Operating Officer
7:00  Dinner for committee and Fermilab and Fermi Site Office management
8:30  Transport to Comfort Inn

Wednesday, July 16
7:45  Pick-up from Comfort Inn
8:00  Executive session and breakfast
9:00  Welcome; Introduction and overview of Fermilab communication
10:00  Internal Communication
10:40  Computing Sector Communication
11:00  User Communication
11:30  Visit public areas of Wilson Hall: 15th floor exhibit area, 2nd floor art gallery, Ramsey Auditorium
12:00  Lunch with Fermilab communication senior personnel
1:30  Community relations
1:55  Overview of education programs
2:15  Community relations and education Q&A
2:30  Communicating within the DOE system
3:00  Break
3:30  Sample VIP tour of lab
5:00  Executive session; Meet with Community Advisory Board members
6:30  Working dinner
8:00  Transport to Comfort Inn

Thursday, July 17
8:15  Pick-up from Comfort Inn
8:30  Executive session and breakfast
9:30  Multimedia production – photo, video and graphic design
10:30  Publications
11:10  Fermilab web presence
11:50   Fermilab social media
12:10   Lunch and executive session
1:30    Supporting national particle physics communication
2:15    Communication to decision makers
3:15    Media relations
4:15    Executive session
6:30    Working dinner
8:00    Transport to Comfort Inn

**Friday, July 18**

8:15    Pick-up from Comfort Inn
8:30    Executive session and breakfast
10:00   Closeout
12:00   Lunch for committee members in One East
1:00    Tour of Fermilab scientific facilities for committee members
5:00    End of review