

Building the capacity of movements to leverage the power of narratives, strategic messaging, and stakeholders

PROJECT COORDINATOR



CORE PARTNERS









RESOURCE PARTNERS









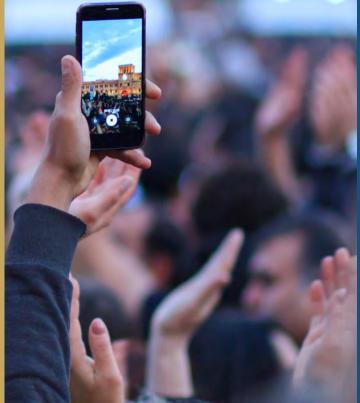












- 04 Executive Summary
- **07** Theory of Change
- 08 Introduction
- 11 5 Lessons Learned
- 17 Overview
- 22 Appendix A: Detailed Approach
- 28 Appendix B: Lead Partner and Project Coordinator
- **30** Appendix C: Core Partners
- 34 Appendix D: Resource Partners
- 37 Appendix E: Dissemination Network and Strategy









he concept of democracy in its many forms—defined and experienced differently around the world but grounded in a core set of shared principles—has survived civil and world wars for nearly 2,500 years. While imperfect in their application, the constructs of liberal democracy—based upon universal human

rights; rule of law; protection of freedoms; and expectations of fairness, justice, and representation have improved lives and opportunities for people around the world.

Yet even in its imperfection, the concept of liberal democracy is a threat to those who seek power and control for themselves while denying the personal freedom of others and fair treatment for all. So throughout history, those who believe in liberal democracy—and in the innate right of people to be free and to govern themselves—have been called to stand up to protect it.

Now is one of those moments.



racy

racy



DEMOCRACY narrative playbook



Through creation and deployment of a Pro-Democracy Narrative Playbook, the initiative will advance proactive, evidence-based narrative(s) and messaging—and activate people through a connected and supported narrative infrastructure.

In doing so, the initiative will build a more conducive upstream environment to promote and strengthen democracy and to defend and expand civic space.

ata and evidence from around the world make clear that authoritarians are dominating the information ecosystem. They are using orchestrated, wellresourced, and weaponized narratives to justify repression and delegitimize democracy. These autocrats are watching and learning from each other, cutting access to information, borrowing from a shared authoritarian playbook, and using narratives as a powerful complement to their repressive actions. The impact is that democratic norms, institutions, and basic freedoms are under attack in nearly every part of the world, including the United States. As a result, people, including young people, are less informed of democratic norms, how to participate in a democratic system, and are less engaged civically from local to national levels.



To be sure, the democracy camp is not idle.

Numerous communication initiatives and advocacy campaigns are defending democracy in important ways. Frontline democracy champions and advocates risk their lives every day in their fight to protect basic freedoms and unmask repression.

Ongoing donor community support for pro-democracy movements, independent journalism, women's empowerment, youth agency, cybersecurity, and other traditional initiatives to strengthen civil society and protect freedoms are critical.

Unlike the proactive and relentless deployment of narrative to delegitimize democracy, efforts to advance democracy are operating from a largely reactive and defensive posture that is consumed with countering authoritarian narratives, messaging, and actions. The existing work is critical, but it is missing a key strategic approach that combines traditional pro-democracy activities with proactive values-based narrative communication. Too often, pro-democracy efforts are focused downstream, while authoritarians increasingly control the upstream. While the downstream work of countering mis-, dis-, and malinformation (MDM); protecting election workers; addressing threats to civil society; and more must be continued, it is critical to also move upstream to change the enabling environment.

Through creation and deployment of a Pro-Democracy Narrative Playbook, the initiative will advance and measure proactive, evidence-based narrative(s) and messaging—and activate people through a connected and supported narrative infrastructure. In doing so, the initiative will build a more conducive upstream environment to promote and strengthen democracy and to defend and expand civic space.

The existing work is critical, but it is missing a key strategic approach that combines traditional pro-democracy activities with proactive valuesbased narrative communications.



The initiative proposed here will use data and evidence to develop, test, measure, and refine a prodemocracy narrative (or a constellation of narratives) and a set of customizable message frames that can be adapted for use in diverse communities by diverse actors and stakeholders, including young people. Through creation and deployment of a **Pro-Democracy Narrative Playbook**, the initiative will advance proactive evidence-based narrative and messaging—and activate people through a connected and supported narrative infrastructure. In doing so, the initiative will build a more conducive upstream environment to promote and strengthen democracy and to defend and expand civic space.

The initiative will build and work with multisector coalitions and with pro-democracy local actors, providing tools and knowledge to build the capacity of pro-democracy organizations to advance more effective narratives that resonate with local communities and stakeholders. Over time, the initiative will strengthen and play a critical role in building public will to advance the cause of democracy in an inclusive way.

The work described here is intended not to replace existing efforts but to complement and reinforce them through evidence-based narrative communications. It is intended to build a cross-sector coalition of funders, organizations, fields, movements, and citizens working together over a multiyear time horizon through sustained commitment and shared purpose.



of people globally say they want to live in a democracy.

About Metropolitan Group

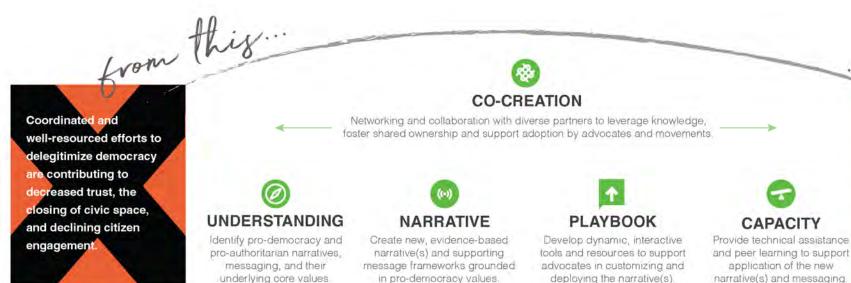
Metropolitan Group has significant experience leveraging narrative as a tool of social change to shift social norms and affect policies, practices, behaviors, and institutional cultures. We provide research, design, testing, capacity building, and direct technical assistance to pro-democracy movements that are defending civic space, human rights, and justice and promoting well-being around the world. We have provided cutting-edge expertise to large-scale narrative change initiatives both domestically and globally on behalf of the Sierra Club, Robert Wood Johnson Foundation, Ford Foundation, MacArthur Foundation, USAID, and others. We have engaged partners on five continents and have led research for a variety of initiatives and funders in 19 countries on five continents on the subjects of advancing the cause of liberal democracy, defending civic space, and addressing weaponized pro-authoritarian narratives.





THEORY OF CHANGE

By advancing proactive evidence-based narrative and messaging—and by activating people through a connected and supported narrative infrastructure—we will build a more conducive upstream environment to promote and strengthen democracy, and to defend and expand civic space.¹



A more fertile enabling environment exists to strengthen democratic principles and institutions, expand civic space and engagement, and inoculate against authoritarian action and MDM.²



Monitor and identify opportunities to engage in both proactive and rapid response communications to advance and build currency for the new narrative(s)



To be effective in both the near and the long term, pro-democracy advocates must do two seemingly different but closely related things at once; they must increase their efforts to push back against attacks on freedom and democracy, and the spread of MDM, while also working upstream to deploy pro-democracy narratives and messaging that make it harder for anti-democratic narratives and MDM to take root in the first place.







owerful narratives that delegitimize democratic norms and deepen polarization are an increasing trend around the world. Advanced by authoritarian leaders and regimes, nationalist political parties, populists, and others who hold (or seek) power, the orchestrated use of these narratives undermines the belief in democratic institutions, civic life, social cohesion, and the fundamental freedoms that are the promise of democracy. As information landscapes become increasingly saturated—and suffused with mis-, dis-, and malinformation (MDM)—these narratives further erode faith and trust in democracy.

While democracy remains popular and is the preferred form of governance for the majority of people, there are real threats. The growing entrenchment of narratives seeking to delegitimize democracy in recent years is contributing to already declining involvement in the civic engagement and self-governance at the heart of any functioning democracy. It also encourages attacking and targeting of civic space and legitimizing mindsets and norms that justify rights violations, which further deepens polarization. If young people, in particular, are equipped with civic and life skills and are supported to take action in their communities, then they will be more likely to support democratic practices.

Developing and advancing a proactive narrative that strengthens trust in democracy and encourages engagement in it—is a critical part of building inclusive and durable democracies around the world that transcend elections and partisan politics. If deployed in a synergized and sustained way, such a narrative could create an enabling environment that makes it easier to advance a wide range of policies and systems change reflective of the tenets of liberal democracy. This would be in direct contrast to the current efforts of many pro-democracy advocates, which too often focus on single-issue concerns and time-limited efforts (e.g., pushing back against restrictions on voting) that fail to create the firm foundation on which broader systems and policy change can be achieved and sustained over time.

Today, proponents of democracy face both an inflection point and a unique opportunity to reclaim the narrative ecosystem and push back against the highly weaponized narratives being used to deepen the divisions between people, increase political polarization, and erode basic rights and freedoms. The need has never been greater for effective and shared pro-democratic narratives—and their supporting message frameworks—that can both counter weaponized narratives and activate civic action and support for democratic norms.

lau-thor-i-tar-i-an \o Brit var of A -'tar- sometimes 'othera manitarian)] often b : of, r freedom mission ought and every ma comman s place, iss....g from to be ordered ruthlessly 2 : of, relating to, or fav rates power in the hand lite not constitute hand To be effective in both the near and the long term, pro-democracy advocates must do two seemingly different but closely related things at once; they must increase their efforts to push back against attacks on freedom and democracy, and the spread of MDM, while also working upstream to deploy pro-democracy narratives and messaging that make it harder for anti-democratic narratives and MDM to take root in the first place.

As shown on page 8, by advancing proactive, evidence-based narrative and messaging—and by activating people through a connected and supported narrative infrastructure—the initiative will build a more a conducive upstream environment to promote and strengthen democracy and to defend and expand civic space.

The initiative outlined here will produce an evidence-based and tested proactive democracy narrative, supporting message frameworks and the tools to foster application to bolster the work of prodemocracy advocates. The work will start with applied research and analysis—mapping and deconstructing the architecture of the existing democracy narrative landscape around the world. It will then develop, test, and refine a proactive and inclusive democracy narrative that can restore trust in democracy. It will package actionable information (data on the narrative

landscape, priority values, narrative and message relevance, motivation, and credibility) to build capacity to effectively apply the narrative.

The work will be guided by a core group of individuals and organizations representing diverse viewpoints along the political spectrum, who are bound by a common goal of restoring faith in and building support for democratic principles and resilient democratic institutions. It will provide opportunities for customization of messaging through direct and ongoing technical assistance. The activities will be informed by ongoing analysis of core issues including the intersection of trust and elections, social dialogue and sociopolitical conflict, corruption, hyperpolarization, civic education, the impact of Al on democracy, and other key issues.

The initiative will help proponents and allies shift from a defensive or reactive narrative posture to a strategic and sustained effort that changes the enabling environment. It will build upon and incorporate learnings from related work in diverse countries on five continents. The result will be an evidence-based narrative and message framework that can be customized by field organizations working here or working globally toward a common goal of advancing democracy.

Narratives are the meta-stories through which people make sense of what they hear, see, and experience, and they provide a filter through which people process information. As such, they influence attitudes and behaviors, shape social norms and community expectations, and set the context for consideration of policies and systems that either advance the cause of social justice or protect entrenched power and privilege.

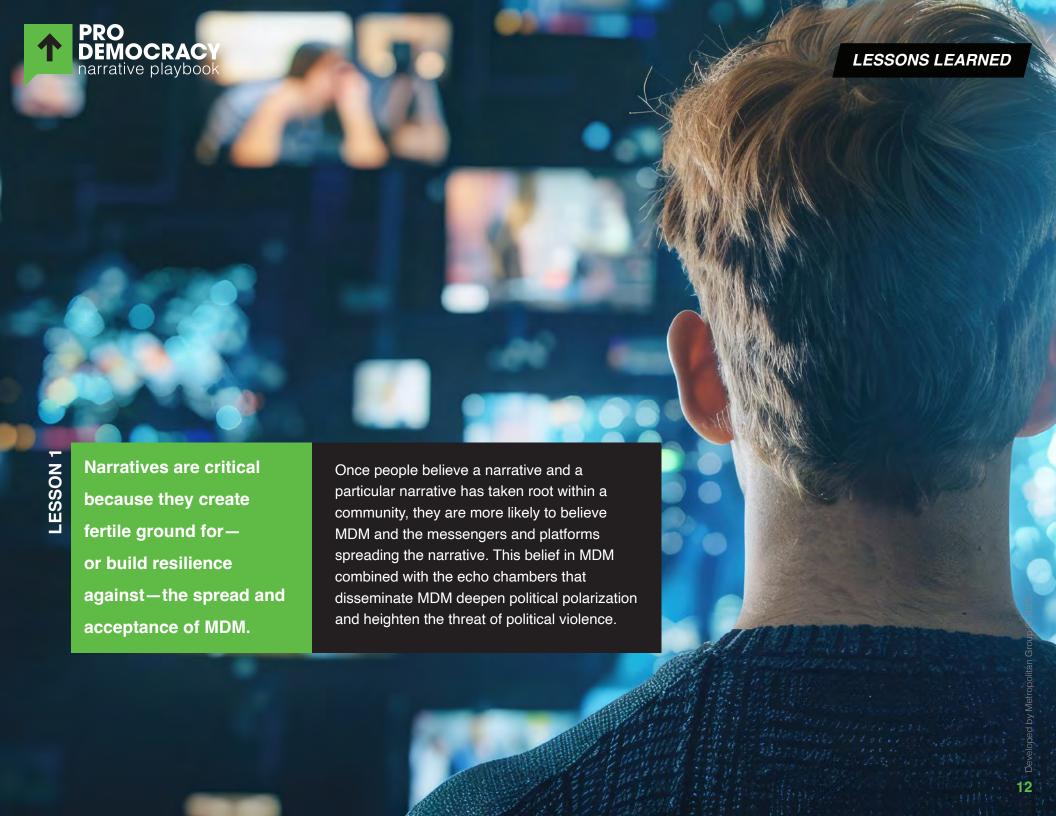


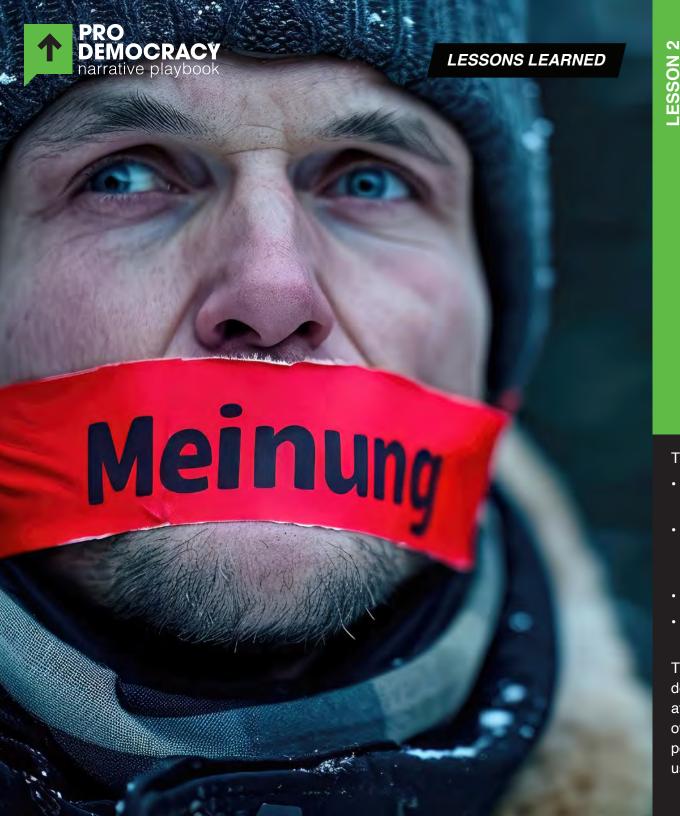
5 LESSONS LEARNED

Metropolitan Group's research of global narratives in 19 countries about democracy and civic space discourse has highlighted several important insights about narratives.







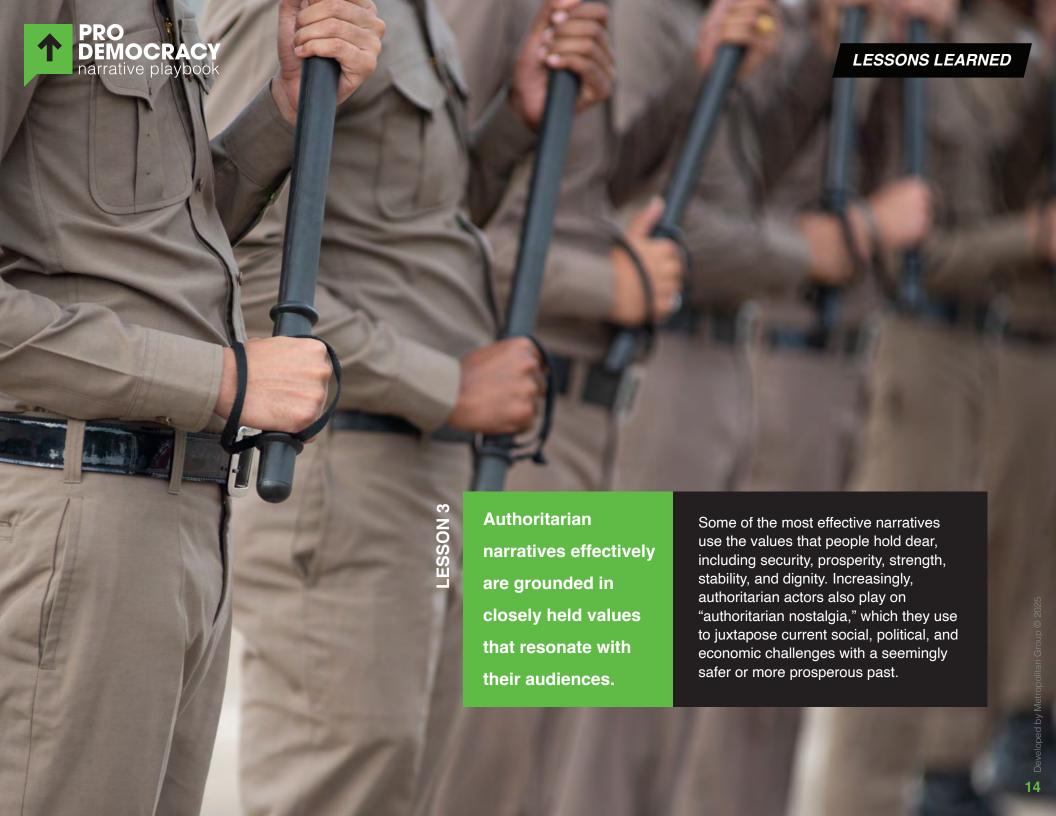


Authoritarian actors are skilled and effective at orchestrating and weaponizing narratives that legitimize their actions and erode support for democracy, democratic institutions, and democratic values. From large, well-resourced states like Russia and the People's Republic of China to smaller states like Hungary and El Salvador, authoritarian regimes are deploying a common set of narratives, and these narratives cross borders and are used by others.

These narratives articulate the following:

- Ensuring safety and security requires sacrificing norms, institutions, freedoms and rights.
- Only strong and decisive leadership can address current social, economic, political, and security challenges.
- Enemies and outsiders seek to destroy our way of life.
- Democratic institutions are corrupt and unable to address multiple challenges.

They do all of this while appropriating the language of democracy and elections to legitimize their rule and to attack legitimate political opposition. These narratives overlap, interconnect, and reinforce each other in a powerful narrative playbook that authoritarians are using to their advantage.







Pro-democracy narratives are seldom framed in ways that evoke shared core values, too often employ technical language, and overestimate the extent to which people, including young people, understand the principles of liberal democracy and the ways in which democracy affects their lives.

Our research in 19 countries—backed by a review of published research completed by others—has found that the core value of freedom has been found by numerous studies to be both powerful and authentically associated with liberal democracy. Yet the value of freedom is not often evoked in pro-democracy messaging. In addition, pro-democracy narratives tend to use a deficit frame (e.g., "democracy in decline") rather than the asset framing that connects the principles and practice of democracy to what really matters in people's lives. As a result, pro-democracy messaging is not perceived as relevant or inspiring—and often is not accessible—to most people.



The democracy "brand" remains strong in many countries despite significant challenges to the tenets of liberal democracy.

According to a 2023 report from Open Society Foundation on a survey conducted in 30 countries around the world, 86 percent of respondents said they wanted to live in a democracy, compared to only 20 percent who believed authoritarian countries can meet the needs of their citizens. So it is not surprising that authoritarians are appropriating and reframing democracy to their advantage, because it confers legitimacy and because it remains a popular concept. Yet in many countries, the concept of democracy is defined almost solely by elections rather than a set of principles. However, in many cases, people's receptivity to narratives, or their attitudes and choices, is shaped by their assessment of tangible personal and communal benefits such as economic factors, jobs, and safety rather than a binary choice in favor of democracy or authoritarianism. Many people believe that democracy and democratic rights are important, but they may not believe they are a priority compared with other daily challenges; they can simultaneously hold beliefs about democracy and authoritarianism that may seem contradictory.





OVERVIEW

Purpose

Build upstream currency for a pro-democracy narrative (or set of narratives) and supporting message frameworks to create a more fertile enabling environment to strengthen democratic principles and institutions, support civic space and engagement, and inoculate against authoritarian action and anti-democratic MDM for key demographics.



this!



Deliverables

The activities described below will produce a dynamic online Pro-Democracy Narrative Playbook composed of interconnected and actionable tools that include the following elements:



This initiative will build upon and deliver value to the many partners, researchers, funders, advocates, movements, and others who are examining narratives about democracy or are designing and utilizing messaging to defend democracy and civic space. The initiative will engage and collaborate with a diverse network of partners to leverage and build on the knowledge gained from their efforts and to participate in a co-creation process to create the narrative and playbook. In addition to a cross-sectoral Advisory Team and a youth advisory group that provide insights and guidance throughout the process, the initiative will also engage and collaborate with the broader community of advocates, researchers, civil society organizations, funders, and others to inform the work while also building currency for the new narrative among them.



O Understanding

Drawing on existing research and data supplemented by our own original research—the initiative will arrive at a detailed understanding of the current narrative landscape relative to the advancement of democracy and efforts to delegitimize it. The initiative will identify and describe in detail the core values, narratives, and messaging being employed by both prodemocracy and pro-authoritarian movements and actors. The final report will also assess the extent to which these narratives and messaging are taking hold and generating engagement and influencing action.



pro-democracy pro-democracy pro-democracy pro-democracy pro-dem<mark>ocracy pro-democracy p</mark> pro-democracy pro-democracy pro-democracy pro-democracy pro-dem<mark>ocracy pro-democracy p</mark>p pro-democracy pro-democracy pro-democracy pro-democracy pro-dem<mark>ocracy pro-democracyé</mark>p pro-democracy pro-democracy pro-democracy pro-democracy pro-dem<mark>ocracy pro-democracy p</mark>





The narrative(s) will be based on extensive research and rigorous testing and will allow for customization for different stakeholders, issues (e.g., freedom of expression, gender equity, voter registration, civic participation, discrimination, inclusive democracy), and geographies. The evidence-based and tested narrative(s) and supporting messaging will be grounded in a set of core values that are relevant to and resonant with liberal democracy.



To leverage, support, and help build the capacity of pro-democracy movements and advocates, the initiative will deliver a comprehensive interactive online pro-democracy playbook. This interactive online playbook will introduce the narrative(s) and supporting message frameworks and will summarize the research on which these tools have been based. This resource will include a discussion of the closely held values that are foundational to the narrative(s) and messaging as well as easy-to-use guidance on how to apply the narrative and to tailor it to specific issues, cultures and communities, and environments. The playbook will also provide guidance on how to deploy the new narrative(s) and messaging through engagement with earned, social, and paid media as well as with the pop culture and entertainment sectors.







The playbook will be complemented by training and technical assistance that will be provided on narrative and message customization and deployment, stakeholder mapping and engagement, and more, for example, monthly free online trainings, presentations at national and international conferences and convenings, and utilization of a technical assistance platform to provide online support and help to access data and improve application of the narrative(s). The online playbook will also include a searchable database of training modules, webinars, and tools as well as facilitate a peer-to-peer network to share learnings on successes and challenges. These tools and resources will increase the effectiveness of pro-democracy advocates to communicate the narrative(s) and to tailor the messaging to be relevant to a broad range of issues associated with the advancement of liberal democracy and to push back against MDM.



The initiative will feature ongoing monitoring, tracking, and analysis of rising and changing narratives, early warning indicators, and rapid response development of messaging and content that advocates can use/customize to leverage opportunity and respond to challenges in the narrative/information ecosystem. This resource will provide up-to-date political economy analysis, inform updated messaging, and issue resources to the Pro-Democracy Narrative Playbook to facilitate both proactive and rapid response communications to advance and build currency for the new narrative. The initiative will engage in ongoing rigorous monitoring and evaluation that builds a body of verifiable evidence and contributes to refinement of the narrative(s) and messaging through iterative implementation by generating understanding of what works, what does not work, and why.







CO-CREATION: Engage and collaborate with a diverse network of partners

- **Advisory Team/Creation and Initial Engagement:**
 - The initiative will engage a cross-sectoral international team of experts and practitioners whose members bring diverse perspectives to provide insights and input, and to serve as a sounding board throughout the effort described here. The team will include narrative and messaging researchers, think tanks, democracy advocates and activists, funders, leaders from the private sector, young people, and civil society organizations who are committed to advancing liberal democracy. This team will bring perspectives from the field, connection to relevant work that can be amplified and built upon, and shared ownership through participation in the formative and creative process. This Advisory Team will be engaged at key points to be described in the relevant sections below to help facilitate collaboration with other research initiatives (see activity 2), share learnings and data that contribute to the field, incorporate learnings from others into the resources and tools being developed, and increase application by engaging their networks.
- **Research review.** The initiative will engage and collaborate with practitioners and advocates, researchers, academics, civil society organizations, funders, and others to gather and review research already conducted on the subject of narrative relative to the advancement of liberal democracy and authoritarian efforts to delegitimize democracy. This work will identify cross-cutting observations and findings, and establish benchmarks for measuring changes in utilization, awareness, and adoption of pro-democracy narratives. The initiative will also collaborate with the Advisory Team and others identified above to identify gaps in current understanding to be examined in the original research described in the pages to follow.
- Ongoing Networking and Collaboration.
 - Recognizing that authentic opportunities to participate in the development process are essential to obtaining buy-in and increasing the likelihood of adoption, networking and collaboration will be central elements of initiative in all stages. As described below, the initiative will include significant engagement opportunities through participation in key insight interviews, testing methodologies, collaborative work sessions, and opportunities to review and provide input on the development of new tools and resources, including the interactive narrative playbook. During the implementation phases, peer learning, training and technical assistance, and rapid response strategic narrative support, will encourage and facilitate customization and utilization of the narrative and messaging. Through networking and collaboration, the initiative will identify and support a diverse set of "champions" among the civil society organizations, coalitions/ movements, advocates and activists, researchers, academics, funders, and others engaged as part of the initiative. These champions will help decentralize and increase the reach and efficacy of efforts to expand and diversify the range of individuals, organizations, and movements who are adapting and deploying the narrative and messaging to better advance democratic principles and outcomes.



UNDERSTANDING: Assess the existing landscape

- **Advisory Team/Creation and Initial Engagement:** The initiative will engage a cross-sectoral international team of experts and practitioners whose members bring diverse perspectives to provide insights and input and to serve as a sounding board throughout the effort described here. The team will include narrative and messaging researchers, think tanks, democracy advocates, funders and leaders from the private sector, youth leaders, and civil society organizations committed to advancing liberal democracy. This Advisory Team will be engaged at key points to be described below. In addition, the Advisory Team will help facilitate collaboration with other research initiatives to share learnings and data to contribute to the field and will increase application and benefit through incorporating learnings from others into the resources and tools being developed.
- Narrative Landscape Scan: In this formative research, a preliminary scan of the existing narrative landscape will identify and map the dominant narratives that shape perceptions of democracy. The landscape scan will rely on a review of existing research and polling and survey data, targeted media analysis, social media analysis, and political discourse analysis methodologies to collect data. Where possible, the initiative will seek to leverage early-stage research and data conducted by other researchers working on the broader activity. In this way, the initiative will include, build upon, and fill gaps in other democracy messaging research initiatives as well as the literature. Subsequent analysis (informed also by the interviews referenced below) will deconstruct the narrative architectures of the four to five most dominant narratives, including analyzing the closely held values, exemplar stories carrying the narrative, messengers, and impact.
- **Key Insight Interviews:** To inform our evolving thinking, the initiative will identify individuals to engage in one-on-one interviews to explore the core values and key elements of the narrative needed to advance democracy. These individuals will be asked to participate in conversations through which the initiative will explore their thoughts about what is and is not working in current narratives both in support of—and antithetical to—the fundamental concept of democracy. The initiative will also explore what has been tried in the past (or is being tried currently) and what can be learned from those experiences. In addition to engaging the Advisory Team to help identify the individuals to be interviewed, members of the Advisory Team will be included in these interviews, either singly or in small groups. Some of the other one-on-one interviews might be conducted with researchers whose studies on this issue will be informative to our process.



NARRATIVE: Articulate the evidence-based narrative(s)

The work described below will be conducted in multiple countries. In each country, local communication professionals will craft narratives and messaging that carry the key narrative architecture reflective of the country's cultural context and in local language(s). Testing will be conducted in appropriate languages. Metropolitan Group utilizes a transcreation process in which narrative and messaging are articulated in local language first and then translated into English.

Advisory Team/Insights to Inform Narrative and Messaging: The initiative will engage the Advisory Team in a collaborative work session to generate ideas and insights regarding the development of narrative and message concepts, as described below. The Advisory Team will be briefed in advance on the findings from the landscape assessment referenced above to ground the discussion in shared understanding of what was found. Once the narrative and messaging concepts have been developed, the Advisory Team will serve as a sounding board to recommend any suggested refinements prior to testing. Later in this phase of work, the Advisory Panel will be briefed on the results of testing to inform the selection of the final narrative(s) and messaging.

2. Narrative and Messaging Concept Development:

The findings, evidence, and data from the narrative landscape scan will be used to craft two to three hypothesis narrative themes and supporting message frames. These hypothesis themes will be developed based on an initial analysis of stakeholder values and formative research (including key insight interviews and existing surveys and polling data). The development process will include consideration of narrative and messaging concepts being deployed by other initiatives.

Narrative and Message Testing: The narrative concepts described above will be tested through qualitative and quantitative methodologies that might include surveys, focus groups, key informant interviews, A/B testing, and other relevant testing formats. The narratives will be tested to understand which overarching stories and message components, language choices, and values resonate most with different stakeholder segments. They will also be tested for agreement, relevance, willingness to share, areas of resistance, barriers and motivators, increases in intention for civic action, and which messengers and mediums are the most trusted. The initiative will also test to adjust for backlash and objections. Local partner(s) who have existing polling and survey capabilities will be utilized to leverage existing resources as much as possible.

Narrative and Messaging Research Findings and Refinement: Once testing is complete, the narrative(s) and messaging will be refined based on testing results, and findings from the testing will be added to the research findings document. A number of factors will be considered in narrative refinement, including values, level of agreement, relevance, credibility, and willingness to share. The refinement process will produce a new baseline narrative (or set of narratives) and supporting message frame that is evidence-based and can be customized in the future for specific stakeholders and audiences. Comparative data from different countries will be used to identify global themes and regional/cultural nuances, which will be incorporated into the refined narrative(s) and messaging and used to inform the development of the playbook and implementation support, as described below.



PLAYBOOK: Develop the new playbook

- 1. Strategic Communication Tools and Resources:
 - The refined narrative(s), supporting messaging to defend and advance democratic principles (rule of law, human rights, freedom of expression, anti-corruption, free and fair elections, etc.), values drivers, and stakeholder insights, will be developed into an actionable and dynamic online message guide and resource center (the "playbook"). It will include practical strategic communication tools for immediate application (including creative content, response messaging, customization tips, and links to other resources and research updates). To support the development, dissemination, and updating of actionable tools and exemplar materials for implementers and other trusted partners to advance new narratives, the playbook will also include:
- **a.** Easy-to-use or -adapt message application tools that may include (but are not limited to) social media analysis and posts, op-eds, FAQ documents, and shareable digital content.
- **b.** Templates for customization of the narrative(s) and message frame, including message development worksheets, formative research narrative scanning templates, and narrative and message testing plans.
- c. Exemplar pro-democracy narrative application content, new research, monitoring/evaluation findings, and tools through multiple internal and trusted external channels.
- d. An overview of the research conducted to be shared as open-access resources to inform the new narrative and messaging to contribute to the broader field of understanding. Mindful of the risks to their safety that many individuals will experience by participating in the initiative's research, the research shared will be carefully vetted to protect the anonymity of the individuals involved and ensure that it does not generate a risk of harm to any individuals or organizations. The research team will follow Do No Harm principles and include development of a security plan to protect identities of participants and data security.
- e. Links to other research and communication initiatives to facilitate shared learnings and to contribute to the broader field, increase application, and expand benefits through incorporating learnings from others into the resources and tools being developed.
- 2. Advisory Team/Playbook Review: Advisory
 Team members will be engaged as reviewers of the
 content developed for the Playbook. Their insights
 will inform refinement.



CAPACITY: Build infrastructure and capacity

Training, Technical Assistance, and Peer Learning: The initiative will invite pro-democracy, civic space and related networks, movements, consortia, and organizations to access the resources and receive technical assistance support as participating organizations. Participating organizations will receive direct technical assistance through training workshops throughout the project, with an emphasis on narrative and messaging application. Training will equip participating organizations with tools to build their social and behavior change (SBC) capacity, create a force multiplier within their respective organizations and coalitions, and increase application of the narrative(s). In this way, the initiative will build the capacity of advocates to work broadly on advancing the cause of liberal democracy while also building their capacity to advance specific aligned issues (e.g., information integrity, conflict and violence prevention, gender inclusive democracy, anticorruption, and food security).

Activities might include the following:

- **a.** Production of timely and regular webinars, trainings, and briefings on narrative(s), message application, and SBC approaches
- b. Work with stakeholders to customize message frames for specific issues, stakeholders, and audiences and assist participating organizations in incorporating SBC approaches and the proactive upstream narrative(s) into existing and future activities and strategies.
- workshops to share research and narrative tools and to encourage adoption/application at conferences and convenings (e.g., implementing partners, civil society organizations, philanthropic organizations, private-sector stakeholders, and related issue coalitions). The initiative will explore opportunities to partner with researchers and other pro-democracy communication initiatives where feasible to facilitate shared learning and contribute to the field more broadly.

- d. Peer learning (across regions or countries) through virtual and in-person gatherings of research teams and implementation partners
- Direct technical assistance on message frame customization, content development, and broader narrative dissemination strategies
- f. Creative content and materials development for shared dissemination and for organizations and coalitions to brand and utilize
- **g.** Stakeholder and influencer engagement strategies to advance and build currency for the new narrative, including stakeholder mapping and periodic stakeholder mapping updates
- h. Rapid response assessment and recommendations/technical assistance support derived through ongoing monitoring of narrative discourse, media and social media, and identification of challenges and opportunities



ACTION: Monitor, assess, and respond

- Evaluation, Learning, and Iteration: Robust monitoring, evaluation, and learning will be built into the initiative to understand receptivity to the new narrative within prioritized stakeholder groups; assess preliminary outcomes; adjust the narrative(s), messaging, and strategy based on emerging challenges and opportunities; and continue refining the strategic communication strategy.
- 2. Rapid Response Strategic Narrative Support: Provide rapid response technical advising on shorter-term narrative and messaging needs that arise in the narrative and political landscape, with particular emphasis on leveraging specific moments of opportunity (e.g., elections or new legislation that affects democratic principles and institutions).
 - a. Ongoing scanning in real time of pro-democracy and pro-authoritarian narratives and messaging to identify trends and opportunities for rapid response
 - b. Effective rapid response assessments of specific narratives, influencer discourse and mediums, social media analysis of narratives and messaging, spread and impact analysis, and other rapid response needs
 - c. Strategic counsel and direct support recommendations on message framing, content, timing, messengers, and mediums
 - **d.** Monitoring, evaluation, and learning of applied narratives to further refine narratives, supporting message frameworks, and application approaches and to increase the evidence base to drive utilization





Metropolitan Group

the power of voice

Metropolitan Group (MG) and its sister company, Impacto Social Metropolitan Group (ISMG), are full-service, strategic, and creative global agencies that create lasting and sustainable impact through social and behavior change (SBC) and narrative shift. We are global innovators in applying narrative change methodologies to protect civic space and advancing democracy, democratic institutions, and democratic values. We have deep experience in using narratives to counter authoritarianism worldwide, and our skilled team has been on the front lines of work to expose the authoritarian playbook while advancing democracy. We bring deep experience working internationally with frontline groups, coalitions, and across sectors to defend democratic principles in countries facing democratic backsliding and rising authoritarianism. We work to directly impact social change and democracy in two ways: 1) create strategic campaigns and initiatives that change attitudes, behaviors, practices, policies, and expectations; and 2) build the capacity and strength of organizations that drive social change and fight for democracy.

MG/ISMG has worked in more than 30 countries on four continents, including projects in Africa, Latin America, the Middle East, Maghreb, and Southeast Asia. We are innovators in co-creation approaches that engage local knowledge and expertise while building capacity around SBC including narrative and messaging creation and application. Our diverse experiences have included researching, developing, and testing of pro-democracy narratives in countries on five continents; countering impunity and corruption in Mexico; advancing women's rights in Tunisia; defending civic space in Mexico and El Salvador; advancing gender equity and addressing gender violence in Mexico; bolstering support for addressing gross human rights violations in Mexico; advancing adoption of clean and renewable energy standards in the United States and Europe; and shifting health expectation norms and policies in the U.S. to a community-of-health framework.

MG and ISMG partner with local, national, and international organizations to co-create and design SBC strategies to advance human rights and the rule of law and to build resilience against authoritarian and anti-democratic narratives that erode public trust in democracy and democratic values. We work with local governments, public agencies, nongovernmental organizations, entrepreneurs, and the private sector.



Context

The international development industry spends more than \$1 billion per year on issues of relevance to social scientists. Historically, most of that money has been spent on projects that have not been rigorously designed or evaluated in a way that would allow for social scientific learning. Over the last 15 years, there has been a trend toward greater rigor. Some of this work has involved academics, but mostly on an ad hoc basis, and it has impacted a small share of overall programming and budgets. PDRI-DevLab is pioneering a distinctive approach to academic engagement with the development industry that offers the potential to:

- Improve the human condition by promoting evidence-based decision-making among national and local governments, aid agencies and local and international NGOs.
- Radically increase the amount of rigorous learning that the international development "industry" consumes and generates as it aims to improve development and humanitarian outcomes.

- Transform how the social sciences are taught at Penn through the application of applied, project-based learning across faculty, postdoctoral fellows, PhD, MA, predoctoral, and undergraduate students.
- Revolutionize the rigor of social science funding at Penn and beyond by consistently delivering research projects connected to real-world policy interventions and local partners in developing countries.

Mission Statement

Launched in 2020, PDRI-DevLab brings together Penn researchers and students who seek to identify solutions to core challenges facing low- and middle-income countries. PDRI-DevLab fosters impactful, rigorous international development research by harnessing the expertise of its interdisciplinary, vertically integrated team of faculty, postdocs, graduate students, predocs and undergraduate fellows. Deploying diverse, cutting-edge methodological approaches, PDRI-DevLab serves as a catalyst for extramurally funded research projects that include collaborations with international/local NGOs, development and government agencies. We also serve as an intellectual hub for Penn faculty and students conducting research on developing countries. PDRI-DevLab affiliates work on a diverse range of international development projects, with our flagship themes being:

Big data and machine learning for development:

Big data and the application of Large Language

Models (LLMs) offer the potential to revolutionize
our understanding of development. For many years,
we have used conferences, working groups and
research, to promote the application of big data to
development challenges. For example, our Machine
Learning for Peace project uses massive data, LLMs
and forecasting tools to understand and predict
where democracy is under threat around the world.
Collaborating with global NGOs and policymakers, we
offer a distinctive tool to defend civic freedoms in an

increasingly authoritarian world.

Migration and forced displacement: One of the greatest challenges of the 21st century is the mass movement of people within and across national borders. These movements not only have enormous implications for those migrating, but also for the communities they leave and those they join. In work across, Niger, Uganda, Guatemala and beyond, we are learning about the conditions for safe and productive migration, how to improve tolerance toward refugees in host communities, and how deportation impacts well-being and re-migration. Our implementing partners at UNHCR, IOM, IADB, the World Bank, JDC, and beyond, have voiced a strong interest in improving the evidentiary basis for policy in this area. In response, we have formed a working



group on forced displacement that brings together top researchers and practitioners twice a year to share findings and improve the evidentiary basis for policy around the world.

- Climate change, land, and the environment: From increased food and water scarcity to greater disease, conflict, and economic loss, climate change threatens all aspects of human life. PDRI-DevLab collaborates with international donors and practitioners to address these challenges through a diverse portfolio of environmental and land research. Focused on reducing key knowledge gaps in conservation and land sectors, our projects explore human drivers of deforestation, land governance, and tenure interventions in Africa and Latin America. Moreover, in Bangladesh, we investigate the downstream effects of climate change on human trafficking. Findings from our research inform program design, enabling organizations like USAID to adopt a more systematic and impactful approach to climate mitigation and adaptation.
- Global health: Our research has assessed
 numerous interventions to promote health behaviors
 in low-income settings, typically drawing insights
 from psychology, economics, and novel technologies.
 In collaboration with researchers and implementing
 organizations in Africa and India, we have conducted
 randomized trials of behavioral interventions and
 evaluated large-scale disease prevention programs.

How We Work

Addressing complex humanitarian and development challenges and opportunities requires joining collaborative forces across disciplines and campuses. PDRI-DevLab facilitates such collaboration among its substantial number of affiliates within and outside the University of Pennsylvania. The focus is on connecting affiliates with the community of development practitioners to enhance programming, research designs, and data collection efforts. Concurrently, PDRI-DevLab endeavors to foster opportunities for Penn students and collaborators at top universities in lower- and middle-income countries, particularly those engaged in the implementation of development policies. This is achieved through four key mechanisms: policy engagement, applied research, applied learning, and diversifying opportunities.

directly with development and humanitarian organizations, including USAID, MCC, the World Bank, and UNHCR. Our focus encompasses research opportunities, promoting evaluable programming, conducting rigorous impact evaluations, and translating academic research for policy audiences. We form partnerships with on-the-ground development implementers like RTI, Winrock International, Mercy Corps, and others, crucial for executing tangible donor-funded projects. During project proposals, we provide feedback on research ideas, rigorous project designs, and the 'Monitoring,

Evaluation, and Learning' component. In the postaward stage, collaboration ensures rigorous IE designs, effective data collection, comprehensive project monitoring, and the publication of results to policy and research communities.

Applied research: As academic researchers, we develop projects with particularly strong potential for generating scientific knowledge and addressing core questions in the field of international development. By building our research with policy practitioners, our research possesses a unique potential to influence key challenges of our times. PDRI-DevLab supports these endeavors through seed grants, logistical assistance, weekly seminars, workshops, conferences, and match-making activities. These initiatives enable our affiliates to expand their research, advancing science and contributing to the improvement of well-being in developing countries.





- Applied Learning: We are committed to interdisciplinary, vertically integrated research teams that use our applied research projects to train cohorts of undergraduate and graduate students. Leveraging existing programs at Penn, we have built a fellowship and capstone initiative that involves students directly in our research. Over the last 18 months, we have had over 50 undergraduate, MA, and PhD fellows learning how to conduct original research by working directly with faculty, research staff and postdocs on our research projects. In combination with a new "Data for Development" minor, International Development concentration, and other curricular initiatives, we aim to provide large cohorts of students with unique training and research opportunities.
- Diversifying opportunities: PDRI-DevLab is committed to closing the gap between researchers in the global north and south through various initiatives, including the PDRI-DevLab Emerging Scholars predoctoral program. Predoctoral students actively engage in coursework, gaining hands-on experience in social science research and creating a pathway to competitive graduate programs. They embody our commitment to enhancing the pipeline of PhD students working on development topics in countries targeted by development policies. Additionally, they facilitate the exchange of ideas between Penn scholars and students from the

global south, contributing to improved research quality by integrating insights from those with firsthand understanding of development challenges. Annually, we host on Penn's campus a cohort of Holman Fellows, international development scholars from sub-Saharan Africa. The scholars present their research, attend seminars, receive advanced methodological training, and initiate collaborative projects with PDRI-DevLab affiliates, and other Penn scholars. The enduring partnerships extend beyond the residency fellowship, with non-residential Fellows continuing to present ongoing research and mentor Penn students, especially during fieldwork.





PACE is a philanthropic laboratory for funders seeking to maximize their individual and collective impact on democracy and civic life in America. The PACE community achieves this through learning, experimenting, collaborating, and modeling vibrant civic space. PACE (Philanthropy for Active Civic Engagement) is a membercentric philanthropic laboratory for funders seeking to maximize their impact on democracy and civic life in the United States. Our members share a belief that America will be healthier and more successful, resilient, and productive, if democracy is strong and the office of citizen is treated as central to how it functions.

The **International Youth Foundation (IYF)** stands by, for, and with young people. Founded in 1990, IYF is a global nonprofit that has worked in more than 100 countries in close collaboration with over 600 local partners to directly serve more than 8 million young people and indirectly serve an additional 12 million young people.

Together with local community-based organizations and a network of corporate, foundation, bilateral, multilateral, and youth partners, we connect young people with opportunities to transform their lives. We believe that educated, employed, engaged young people possess the power to solve the world's toughest problems, and we focus our youth development efforts on three linked objectives: unlocking youth agency, driving economic opportunity, and making systems more inclusive.



Founded in 2005, The Cloudburst Group is a missiondriven, Women-Owned Small Business working to create impact, empower communities, and build resiliency. Cloudburst works to promote democracy, human rights, and governance globally by using rigorous, scientific methodologies to inform strategies to advance democracy and counter authoritarianism and translate these findings into digestible materials to aid in evidence-based decision making. Cloudburst has developed a reputation for executing fast, flexible, and collaborative approaches to monitoring, evaluation, and learning (MEL) on democracy and governance programming that relies on rapid and right-fit solutions that pair methodological rigor with clear reporting and robust utilization and dissemination support. The core of this approach is identifying and executing the most rigorous research and evaluation designs while balancing timeline, cost, and other practical constraints.

Cloudburst is a trusted thought leader in the democracy and governance space, and has repeatedly brought together leading experts with partners and facilitated a collaborative process to understand what programming works and why through fit for purpose MEL methodologies, such as real time learning support, pause and reflect facilitation, developmental evaluation, independent evaluation, and other customized special studies. Cloudburst has deep expertise across a broad range of quantitative (e.g. surveys, econometrics, big data analytics, web scraping, network analysis, and geospatial analysis) and qualitative (e.g. outcome harvesting, most significant change, process tracing, case studies) analytical methods. Cloudburst also has demonstrated skills in applying sound strategic facilitation and communication principles to promote continuous learning for programmatic decision-making, including dissemination products, presentations, workshops, website design, training, and technical assistance to plan for and incorporate research evidence.



MG and ISMG work closely with partner organizations around the world to co-create localized narrative change in nearly every region. We have partnered with the following organizations on pro-democracy narrative research and development, all of whom have agreed to participate as resource partners to bring regional perspective and expertise as part of the Pro-Democracy Narrative Playbook.

diwan

Diwan Research, Libya: Diwan Research has extensive experience in quantitative and qualitative research including designing and conducting public opinion polling, values surveys, and qualitative data collection and research. Diwan's work covers a spectrum of social and political topics, including security and political studies, governance, migration, conflict assessments, and public service delivery in Libya and across North Africa.



Evidence Central Asia, Kyrgyz Republic: Evidence CA conducts quantitative and qualitative research and data collection, specializing in marketing and sociological research, media monitoring, market and consumer analytics, as well as policy and applied research.

Evidence CA has over 10 years of experience and a broad network of patterns in Kyrgyz Republic and Central Asia.

Evidence CA has strong demonstrated capacity in media analysis, social media analysis, qualitative literature review, and political discourse analysis.



Instituto de Democracia y Derechos Humanos, Pontificia Universidad Católica del Perú (IDEHPUCP), Peru:

IDEHPUCP is a leading independent Peruvian research institution that focuses on democracy, justice and human rights, countering corruption, and is well networked with national and regional institutions. IDEHPUCP's staff includes experts in civil society participation, political sociology, historical memory and political communication. Their team has significant experience and capacity in designing and conducting polling, surveys, and public opinion research. Their primary focus is Peru specifically, but they are networked with a number of Latin American research cohorts and consortiums with regional and international focuses.



National Foundation for Development (FUNDE), El

Salvador: The National Foundation for Development (FUNDE) is a leading independent Salvadoran research institute working on the promotion of democratic culture, citizen participation, transparency, macroeconomic development, territorial development, violence prevention, and the fight against corruption. FUNDE's research team includes experts in democracy, citizen participation, integrity and human rights, as well as communications research and digital communications. The team has experience designing narratives, narrative analysis, and behavioral change methods. Their experience includes mixed-method research design, digital listening, and social media scraping. FUNDE is networked within several regional Latin American research cohorts, and has partnered on a number of projects with regional and international reach.



Remotivi, Indonesia: Remotiviti is a non-profit media monitoring institute which seeks to boost the media's sense of public responsibility, publishing on a wide range of topics including press freedoms, corruption, police violence, popular culture, and social attitudes. Remotivi has broad subject matter expertise and experience in issues related to human rights; democracy; messaging; and media, as well as experience with formative research methodologies and narratives; testing and focus group discussion convening; data analytics, and a broad network of partners across Indonesia.



TeamFluence, Serbia: TeamFluence is a strategic communications and marketing agency that has worked extensively in communications and marketing, including social and political communications and consumer marketing. TeamFluence has experience with message development and testing including surveys, focus groups, interviews and other methods. Their work has spanned several salient areas, including assessing information manipulation, clickbait, and sponsored media around Brexit. TeamFluence's work centers on Serbia, but they maintain a global and regional perspective through partnerships with international organizations and agencies.





WR Numero Research, Philippines: WR Numero is a well-regarded public opinion and research firm that specializes in quantitative and qualitative research as well as designing and implementing social and behavior change campaigns. They have conducted research on democracy narratives, values, information manipulation, and a range of other social and political topics. They also design and conduct public opinion polling and surveys, social media listening, and social policy research. WR Numero employs a large team of over 100 social scientists, researchers, and scholars working across 17 Philippine provinces, giving them reach to conduct research across diverse geographic and linguistic populations. They also frequently partner with international coalitions and organizations.



Metropolitan Group brings a large and diverse network of partner organizations (beyond the democracy space) to the Democracy Playbook initiative and has connections to organizations and networks across multiple sectors with the potential to reach **tens of millions of Americans**. Because the assault on democracy affects nearly every sector, it's imperative that this initiative reaches a broad mix of organizations and networks. Outreach and engagement of broader networks is built into the Democracy Narrative Playbook initiative from the start in several ways:

Co-creation: The initiative will engage and collaborate with a diverse network of partners to leverage and build on the knowledge gained from their efforts and to participate in a co-creation process to create the narrative and customized messaging for specific sectors and stakeholders.

Capacity Building: The initiative will provide, through the broad network of disseminating partners, direct technical assistance to apply the narrative and supporting message frameworks, narrative application workshops and rapid response support to movements, consortia, and organizations. to access the resources and receive technical assistance support as participating organizations.

Broader Dissemination: Through our broad network of dissemination partners and through the Playbook initiative's online hub, we will provide access to all playbook resources including narrative and message guides, research and data products, application examples and access to campaigns across issues.

Developed by Metropolitan Group @ 2025



MG has engaged with dozens of organizations who are ready to use their own channels to disseminate the Narrative Playbook tools and resources to their networks and partners. In addition, we are building an outreach network of organizations and conducting ongoing outreach and continue to add dissemination partners. The reach of these networked organizations has the potential to connect the democracy narrative with more than:

- 7,000 dissemination partner organizations (including philanthropic partners and their grantees, NGO partners and the private sector)
- · more than 2,000 faith congregations
- more than 1,000 higher education institutions in the U.S. and abroad.
- Combined, this networked approach has the potential to reach tens of millions of Americans across all 50 states through trusted direct channels of organizations they are already connected with.

Through the Playbook initiative's existing (and growing) network of more than a dozen core partners and through MG's practice areas in health, environment, and social justice we have a deep network of organizations and coalitions across multiple sectors. While the initiative will meet critical needs of the democracy and civic space sectors, it will also leverage a moment-of-movements to create a force multiplier for advancing an upstream democracy narrative at the local, state, and national levels. This broader engagement spans nearly a dozen sectors including philanthropy; faith; media; veterans; health; environment; human services; arts and culture; civil rights; labor; private sector; academia; and other community-based organizations and advocacy groups.

Through this cross-sectoral coalition we are building a network of local, state, national, and international dissemination pipelines. This network of organizations will facilitate dissemination through their trusted relationships and existing channels to subsectors and grassroots organizations. These pipelines are built in mechanisms for sharing tools and resources; customizing message frameworks that advance the prodemocracy narrative for specific stakeholders, sectors, and geographies; and building a cross-sectoral network of organizations using a similar upstream democracy narrative.

The groups listed in the table below represent a cross section of sectors that depend on the principles and institutions of liberal democracy as the operating system for their social impact. MG has existing relationships with many of the groups on the list (several of them are existing clients) and has identified partner pathways to others. While a critical element of the funding we are seeking for the initiative is to support a movement-of-movements coordinator to do the deep engagement, recruitment and support work for activation, we are currently self-financing staff time to the degree we can to conduct outreach and are securing dissemination partners on a regular basis. The initiative will support each organization to disseminate tools, resources, and application capacity building through their networks, partners, and members. The list is not exhaustive and will continue growing as more organizations develop their narrative capabilities.



FOR MORE INFORMATION PLEASE CONTACT:

Eric Friedenwald-Fishman efishman@metgroup.com

Kevin T. Kirkpatrick kkirkpatrick@metgroup.com

Rodolfo Córdova-Alcaraz rcordova@metgroupmexico.com



the power of voice