Lessons in Perseverance

Not just an event, a movement
INTRODUCTION

In 1984, Brazil was undergoing rapid change. The military dictatorship that had ruled Brazil for the 20 years prior was giving way to a democratically elected president. Conversations about politics, civil authority, and the future of Brazil conveyed hopeful optimism as the country prepared for the election in January, 1985. The economic future of the country — where inflation, unemployment, and state-directed, large-scale projects had dominated — faced change, as well.

For 20 young entrepreneurs, the future of the country was open for input more than at any other time in their lives. In Porto Alegre, Brazil, they formed the Instituto de Estudos Empresariais (IEE) — the Institute of Business Studies — as a nonprofit, nonpartisan organization focused on developing both a free-market economy and the business leaders needed to make that economy grow. This group of free-market thinkers set out to be “the best business leadership development center in Brazil,” and have successfully upheld that vision for more than 30 years.

First, the mission of IEE was established: “To form business leaders who are committed to a model of social and political organization for Brazil based on the democratic ideal of individual freedoms, subordinated to the rule of law.” Then, to implement that vision, the newly founded organization looked for a signature project that would bring together current and future leaders of Brazil, strengthen their understandings of free-market principles, build networks of leaders willing to work together on shared causes, and find solutions to the social, political, and economic issues facing Brazil.

The timing was perfect. In 1988, Brazil adopted a new constitution, which decentralized some of its authority and allowed greater flexibility for municipal governments to work with civil organizations to adopt reform measures. That same year, IEE held its first “Fórum da Liberdade,” or “Liberty Forum.” This annual conference attracts thousands of attendees, and
brings together cultural, and political leaders to discuss Brazil’s current state and its future.

Today, IEE’s staff of four relies on an annual budget of around $500,000 (U.S.) and 500 volunteers to help make its projects happen. Júlio César Bratz Lamb, serves as the president of IEE, and Pedro De Cesaro as its director of institutional relations and the Fórum da Liberdade. (Leadership committees rotate on an annual basis to allow young talent to offer fresh insight.) With this team, IEE has built what is now described as “by far the largest liberty-oriented event in the world.”

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While IEE coordinates many other projects, including weekly events for its members and a robust leadership development program, the Fórum da Liberdade “is the biggest and most important IEE project.” Because the forum is the only event IEE opens to the general public, it gives the organization a stage with which to display its research, programming and offerings on a large scale. The event has developed a strong following, with more than 5,500 people attending in 2017. The audience includes entrepreneurs, professionals, politicians, teachers, university students, members of the media, and other shapers of public opinion.

IEE describes the Fórum da Liberdade as “a big lighthouse to the ideas of freedom in our country.” By serving as this lighthouse, it has had a strong influence on both business and society in Brazil and beyond the country’s borders.

“It was billed modestly by the institute as the largest Libertarian gathering in Latin America. Quite wide of the mark actually, it is by far the biggest in the world,” said Godfrey Bloom, independent member of the European Parliament for the Yorkshire and North Lincolnshire region.

In 2017, in recognition of the 30th annual Fórum da Liberdade, IEE expanded the forum’s scope. As the Jornal do Comércio (Business Journal) explained, “More than presenting ideas with different approaches to be discussed by the participants, as traditionally happens, the event this year will carry out initiatives to stimulate entrepreneurship, and also training in the areas of freedom, leadership, and economics.”

MAINTAINING RELEVANCE

To sustain interest in the forum, while increasing participation and impact, IEE has been strategic in both preparing for the event and developing its annual focus. Because, as President Lamb said, “We hope to continue to impact society with our forum for many more years.”

One key to the success of the event has been its focus on a timely and relevant topic each year, which encourages participants to apply political and economic theory to the practical issues facing the country.

“The themes on the agenda are always polemic, innovative, and extremely relevant, generally related to education, economics, development, social and political aspects,” De Cesaro explained. “They involve dialogue between diverse currents of thought, with the participation of sociologists, politicians, economists, and philosophers. In this sense, the most
compelling aspect of the Freedom Forum is to be driven by freedom of ideas.”

To make such a strong impact, the topic for each forum must resonate with the intended audience and reflect the current issues facing the country. Pedro De Cesaro explained:

*We change the subject annually, according to the rhetoric in the country at a given moment. This year, we had the case of President Dilma’s impeachment, so the theme was “The Future of Democracy,” because many opponents pointed to it as a “coup.” The theme begins to be studied around 6 to 8 months before the forum.*

When determining the annual theme, IEE seeks counsel from two key groups: the board of directors, and the marketing agency hired to promote the event. This way, from the very beginning, there is alignment between how the event will be promoted and its focus on realizing IEE’s mission and vision.

During the event, participants debate and discuss solutions for the problems presented. The goal is not simply to discuss theory, but to find practical solutions that can be implemented. Jorge Gerdau Johannpeter, chairman of the Gerdau board of directors, summed up the impact of the forum:

*The Fórum da Liberdade is an opportunity to engage in an open debate filled with multiple ideas regarding respect for each individual, for the law and for private property. The great advantage of the Fórum da Liberdade is that it proposes solutions. There are other events, but they don’t offer concrete ideas.*

In addition to honing in on an annual topic of great interest and
relevance, IEE continues to look for innovative ways to engage participants in the forum. In 2015, the organization created an application to increase interactivity among attendees. The application provided its users with a full event schedule, bios for all the speakers, and a w& feature. In the first year, the application was downloaded nearly 1,000 times, and more than 200 participants submitted questions to speakers. IEE also added the “Unconference,” which allowed student groups and other organizations to workshop their projects promoting liberty in Brazil.
MEASURES OF SUCCESS

IEE measures success in many different ways, including the overall impact of its leadership development projects, forum participation, and media reach. Such metrics tell a story that extends far beyond the forum itself, confirming IEE’s business model and theory of change.

PARTICIPANTS IN IEE PROGRAMS

At its core, IEE is a leadership development organization that offers a series of programs and events for members. Over the years, these programs have fed the development of the Fórum da Liberdade agenda, meaning that success in its development programming throughout the year directly relates to the success of the forum. As Pedro De Cesaro reported:

*Nearly 1,000 entrepreneurs have passed through its formation circle, which includes moot courts, studies of books, internal seminars, external communication activities, and individual competition. As a result, most of them are now leaders in various sectors of Brazilian society, spreading the values of freedom with responsibility, meritocracy, and individual rights. Currently, the institute has … approximately 200 members, both active and honorary.*

FORUM PARTICIPATION

In addition to measuring the impact of its regular programming, IEE measures the individual effect of the forum. For example, in the last year, IEE identified that the forum had:

- 6,372 participants
- 6 days of events
- 5,240 donated books
- 6 videos produced
- 14 projects presented at

UNCONFERENCE

IEE also looks beyond the quantitative metrics of participation to examine how well the organization is reaching its target audience. One qualitative measure of impact is the relative prominence of the political figures who attend the forum, such as political and government leaders at the municipal, state, and federal levels, as well leaders from around the world.

“We invite the most important politicians of Brazil to the event, in order to show that there is a public interested in free-market policies and to
influence future policy decisions,” said De Cesaro. Because IEE is strategic about its invitations, the roster of participants is impressive, and even includes Brazil’s president, Luís Inácio “Lula” da Silva.

MEDIA IMPACT
For the 2017 Fórum da Liberdade, IEE documented:

- More than 30,000 online views during the event
- More than 150,000 online views of the produced materials
- More than 100 print, television, and radio reports

EXTERNAL REPUTATION
IEE seeks to promote a culture of liberty around the world. As such, the organization is justifiably proud of the reputation it has achieved and the influence it has on other think tanks in the liberty movement.

Throughout its trajectory, the institute has used its unique business model to foster arguments and created conditions to deeply discuss economic, philosophical and political debates that few centers of excellence in Brazil have been able to. By training people to lead by example, guided by ethical values and motivated by individual ability, IEE has achieved a leading position in the defense of liberty and promotion of meritocracy and entrepreneurship.22

IEE’s recognition in international publications and think tank rankings has been a result of its continued commitment to share its vision and efforts far beyond the borders of Brazil. This may be why Gabriel Calzada Alvarez, president of Universidad Francisco Marroquín in Guatemala, called the Fórum da Liberdade “the Superbowl of liberalism,”23 and why Atlas Network named IEE a finalist for its 2017 Templeton Freedom Award.

TIPS AND TECHNIQUES
Over the years, IEE leadership has learned a great deal about how to make an event like the Fórum da Liberdade successful. Of primary importance are time, effort, and intense organization.

TIME
Planning for a major event encompasses selecting the theme, creating the panels, and identifying guest speakers. Plan early so that the programming is in place long before the event begins.

“We usually start thinking about the Freedom Forum six months before it occurs in April of each year,” Mr. De Cesaro said.

Thinking even further ahead, the IEE books its event venues five years in advance.

SPEAKERS
IEE has discovered that the event is more successful if one or two “stars” are
identified early. Hosting sessions that pair rising politicians with relevant and important liberty-minded speakers can help draw both wider attendance and media attention, Mr. De Cesaro explained, adding: “This mix always works.”

LOCATION
Determining the size of the intended audience and developing an inventory of potential sites is critical in planning for the event. IEE hosts these forums at universities to keep costs low, attract students, and ensure quality.

FOOD
The forum increased participant retention by adding food trucks inside the event complex. Thinking through the visitor experience to the forum is an important aspect of planning; if the content is great, but attendees are hungry and uncomfortable, they will not take advantage of all that the event has to offer.

MARKETING
Social media is an effective tool for expanding the reach of event advertising, but IEE adds a personal touch to that effort. IEE associates personally visit each of the schools and universities on their target-audience lists to invite students to the event. As mentioned earlier, an outside marketing firm is also brought in to assist with messaging and promotion.

PLANNING CHECKLIST
The forum could not happen without a thorough planning checklist that includes everything from finalizing event

To keep things fresh IEE introduces new features, like the Unconference-giving it’s audience the chance to contribute to new exciting projects.
logistics to meeting individual speakers’ needs to ensuring that every attendee has a notepad and pen. IEE also builds into its list a pre- and post-event report for the president, and an evaluation of potential IEE members.

PREPARE FOR LOGISTICAL CHALLENGES

Despite all of the best preparations, unexpected issues nearly always arise. IEE shared the challenge that occurred when Mayor João Dória of São Paolo spoke in 2017:

*The mayor, besides being a multimillionaire, is a workaholic. He sleeps only three hours a day and, therefore, has an exorbitant schedule of jobs and meetings. So much so, that to accept to come to the forum, he could only be the first speaker, at the opening at 3:00 p.m., and leave soon after the closing of his speech at 4:00 p.m. because he would have to arrive in São Paulo around 5:30 p.m. for a meeting, he would have a football game at 9:00 p.m. and board for Seoul, South Korea at 11:00 p.m. So we had to get a private jet with one of our business friends to bring him here, as well as armored cars to make the transfer from the airport to the event center. A very good tip is that for this type of personality one should always use the police to release traffic.*

Not all challenges will be this complex, but think tanks should anticipate that complications will come up, often at the last minute. Reserving capacity to address last-minute concerns can make the difference between triumph and disaster.
For IEE, the Fórum da Liberdade has been a successful means to implement its mission for 30 years. It has allowed the organization to bring people together to analyze social, political, and economic issues through large-scale debates, as well as to propose alternative ways to create a society with more prosperity and freedom. IEE has seen this forum as a means to achieve the June Jordan challenge, “We are the ones we’re waiting for.”

Despite political upheaval, a changing economy, and unsteady ground, the IEE has remained steadfast in its belief that free markets are a solution to Brazil’s struggles.

Jeffrey Tucker, director of content for the Foundation for Economic Education and chief “liberty officer” and founder of Liberty.me, provided his insight on what IEE’s persistence in the face of adversity has meant to the liberty movement. IEE, he said, embodies the importance of the never-give-up principle:

*Every country in the world has a liberty movement, but many people worry that they might be wasting their time. They struggle, they blog, they broadcast, they organize, but nothing ever changes. But giving up is not the Brazilian way. Instead of retreat, they took a different route, working ever harder, pushing out at the edges, and diversifying their ranks, applying ever more intellectual and moral energy to the cause.*

*The difference in Brazil is that the leaders of this movement refused to believe that the idea that made life beautiful all over the world — the idea of human liberty — would be permanently marginalized. They had faith that it could be a mainstream driver of events. They have worked to make it happen. And, sure enough, they are now watching history conform to the dream.*

▲ Members of the IEE team on stage at the 2017 Forum de Liberdade.
QUESTIONS

How can a think tank best leverage the input of its marketing team early in the decision-making process for its events?

How does a think tank balance consistency with innovation to maintain both the reputation and the relevance of a long-running project?

IEE has consistently presented the Fórum da Liberdade in good times and under difficult circumstances. How can persistence benefit the work of a think tank? How can a think tank decide if a project should be terminated, or if the organization should stick it out?

IEE combines many internal (members-only) events with one major external event. How can a think tank determine the balance of internal and external projects?

The Fórum da Liberdade brings people together to find solutions, but relies on leadership development to encourage people to move those solutions forward. Other think tanks focus on public policy advocacy as a direct function of the organization. How can a think tank determine which model best will best fit its needs and advance its goals?
FOOTNOTES

4 http://iee.com.br/
5 http://iee.com.br/quem-somos/
12 De Cesaro (2017).
14 De Cesaro (2017).
17 De Cesaro (2017).
18 De Cesaro (2017).
21 De Cesaro (2017).
22 De Cesaro (2017).