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Mission Shift: Using and Evaluating Strategic Communications to Implement Organizational Change

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RESULTS

Mission Shift: Using and Evaluating Strategic Communications to Implement Organizational Change

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Introduction

Using strategic communications to advance a foundation's mission is an increasingly valued tool within the field of philanthropy. Well-established communication practices and an ever-changing marketing and communications landscape provide opportunities for businesses and institutions to reinforce mission-driven messaging and action. More and more, strategic communications is playing a transformative role in philanthropic efforts to drive social change that targets individual and system behaviors, builds public will, and creates community-based culture change (Easterling, Sampson, & Probst, 2010). In fact, the field of communications is experiencing a new era, with fast-paced and emergent practices and tools becoming available to ensure that ideas take hold and messages are delivered consistently for the most impact (Gibbons, 2016).

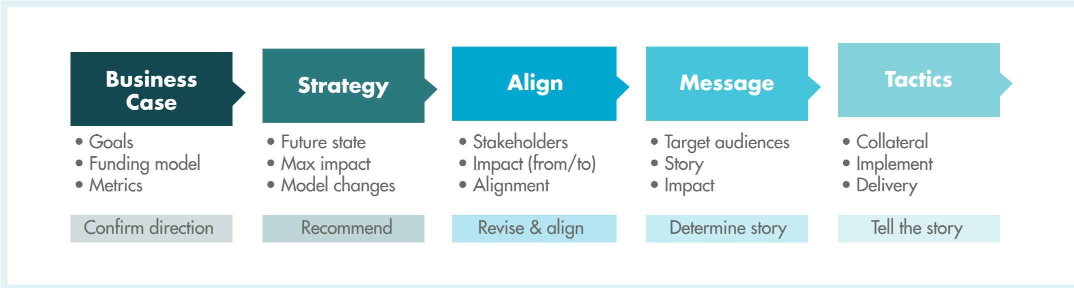
Within philanthropy, the momentum for using strategic communications to drive mission is building among foundations of all sizes (Easterling, et al., 2010). Maximum impact is achieved when the communications philosophy and strategies are rooted in guiding principles such as executive buy-in and end-user message testing, to achieve a broader understanding of how communications are being received and to avoid becoming insular (Canales & Lanfer, 2015).

Like many foundations across the United States, the Colorado Health Foundation, a state-based health foundation headquartered in Denver, has shifted over time toward more strategic philanthropy, using social and financial capital together to achieve impact. The foundation's grantmaking methodology and staffing infrastructure have paved a path toward using strategies beyond grantmaking, such as actively influencing and advancing health policy and adopting learning and evaluation practices that inform staff and the field of philanthropy.

Key Points

- Strategic communications can play a role in implementing organizational change by reinforcing understanding of and advancing audiences to accept the changes that impact them. The Colorado Health Foundation uses strategic communications as an integral tool in achieving its organizational mission to improve the health of all Coloradans. Evidence reveals that it was critical to successfully announcing and implementing significant changes to how the foundation operates and invests.
- This article profiles the strategic communications approach, from its inception through the application of learnings gathered from a subsequent evaluation. The success of the foundation's "change" communications strategy was rooted in use of multiple communications and opportunities to engage with the foundation about the changes. Preparing foundation staff to have front-line communications with primary audiences proved to be critical to conveying information appropriately.
- Applying an emergent-learning practice to this strategy and other ongoing communications work has resulted in grantees' continued awareness and understanding of the foundation's grantmaking opportunities.

FIGURE 1 Developing a Communications Strategy



The foundation also uses strategic communications as an integral tool in achieving its organizational mission to improve the health of all Coloradans (Sherry, 2015). Communications target existing grantees and influential state-based leaders, as well as experts in health and heath care. Until its conversion to a private foundation in 2016, the foundation actively lobbied; today, the foundation no longer lobbies, but still regularly engages in educational efforts to influence public policy.

The Colorado Health Foundation has a long history of investing in communications expertise within the organization, predominantly to ensure brand growth and provide technical assistance to grantees. More recently, an embedded staff model placed communications staff into cross-functional strategy development for grantmaking, with the goal of using communications strategically to achieve goals. Communications is also a critical partner with the foundation's evaluation and learning function, helping to illustrate the impact of its investments and to share learnings with grantees and the field of philanthropy. Through a variety of established traditional and digital channels, communications both inform and influence internal and external stakeholders involved in the foundation's work. The most common types of external communications outreach include:

- sharing information or education about the foundation's work and that of its grantees and partners,
- marketing funding opportunities to potential partners,
- convening thought leaders and influencers, and
- disseminating unique research and learnings.

This article profiles the development and implementation of a "change" communications strategy designed to manage communications throughout a period of significant organizational shifts at the foundation. Specifically, the strategy focused on communicating organizational changes to the foundation's three pillars of work, functional changes to grantmaking, and a new organizational approach to evaluation. Utilizing a traditional model for communicating change provided a logical sequence of activities and support to ensure clarity of these substantial changes throughout the effort. The model also focused on measurement and reflections, or how learning from the experience might be applied to future efforts.

This article is organized as a narrative of the experience. First, it discusses the degree of organizational change that resulted from confirmation of a new strategic direction. Next, it reviews the development and implementation of the communications strategy, including the communications plan, which featured audience identification, messaging, training, and rollout. (See Figure 1.) The article concludes with details of the evaluation approach and learning model designed for determining success and where improvements could be made.

Evaluating Communications for Success or Failure

The primary question addressed in this article is how an evaluation and learning model can help test the degree to which an integrated communications strategy was effective and enabled application of experiential learning to improve outreach. Before the new era of communications, marketing and communications were historically measured for success by the impact of a single medium (or channel, in modern terms). However, the ongoing evolution within the field of communications has provided increased opportunities to simultaneously use several channels for maximum impact and to reach more audiences for an integrated effect. An integrated marketing and communications model is cross-channel in nature and features four elements: a customer-centric approach, content, channels, and measurable results. Evaluation can take varying shapes, depending on intended outcomes (Reinold & Tropp, 2012).

The "change" communications strategy discussed in this article was integrated for maximum impact by using all foundation communication channels simultaneously to reinforce one another. The foundation's traditional approach to external communications calls for program staff to be on the front line, communicating in a proactive or reactive one-on-one manner with grantees. Often, and in the case of this strategy, simultaneous and coordinated communications support one-on-one staff outreach. The evaluation model for this effort was designed at the outset of planning, with intent to rigorously understand how well communications were received and how to improve them. Measurement focused on determining the awareness and understanding of the communicated messages among target audiences, the messaging gaps, and the best channels for communicating the messages. Learning centered on foundation staff understanding the evaluation results, examining how their roles influenced the communications effort and outcomes, and identifying opportunities for improvement.

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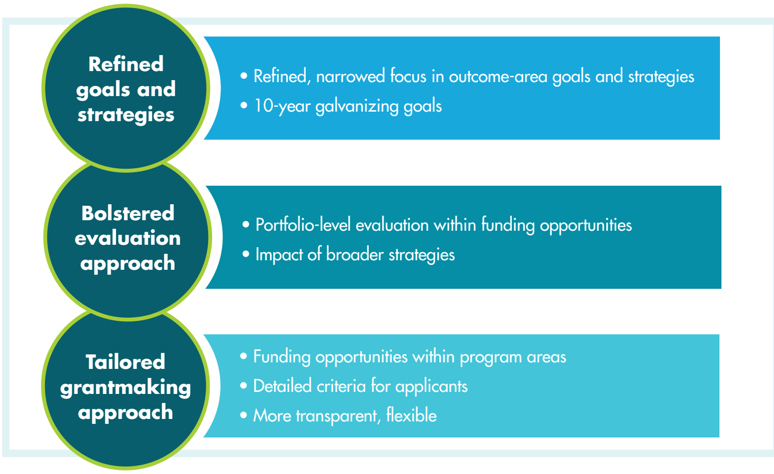
Determining the Degree of Organizational Change

The Colorado Health Foundation is the largest health foundation in the state, with $2.4 billion in assets and approximately $100 million in grants and contributions invested annually in state-based organizations. Nationally, it ranks as one of the largest state-based health foundations in the U.S. (Colorado Health Foundation, 2016.) With a vision to make Colorado the healthiest state in the nation, the foundation organizes its work and goals within three primary community-outcome

FIGURE 2 Changes to How We Work



areas that were established in 2006: Healthy Living, Health Coverage, and Health Care.

The foundation originated in 1995 as the HealthONE Alliance, a nonprofit spinoff of a joint venture between the for-profit Hospital Corporation of America and the nonprofit HealthONE hospital system. By 2006, HealthONE Alliance had changed its name to the Colorado Health Foundation and was awarding upwards of $20.4 million in contributions to nonprofits across the state. The foundation's board adopted the current vision, to make Colorado the healthiest state in the nation, and established the three community outcome areas to drive the grantmaking model. At that time, its grantmaking was largely responsive in nature, open to any 501(c)(3) organization working in Colorado.

The foundation experienced dramatic growth between 2006 and 2012, nearly doubling its staff and its community investment (from $42.2 million to $84.6 million). During this time, the foundation wanted a way of assessing its impact, and implemented a measurement practice it called Measurable Results. This consisted of a defined set of measures, which were tracked for each grant (excluding those which did not provide direct services or programming).

In 2012, the board asked staff to focus on childhood obesity as a battle that is "big enough to matter, and small enough to win." This led staff to initiate a strategic planning effort in late 2012, internally referred to as Strategy Refresh, that aimed to develop a 10-year, goal-oriented investment strategy guided by the foundation's existing vision and mission. Although the initial charge from the board applied most clearly to the foundation's Healthy Living outcome area, staff decided to include the other two outcome areas — Health Care and Health Coverage — as well. Since all of the foundation's goals and strategies had been created in 2006, staff felt that the health landscape had changed enough to merit a full assessment of the foundation's work.

Strategy Refresh included three cornerstones of strategic analysis and development:

- Analyze the shifting health landscape, including the impact of policy interventions such as the Patient Protection and Affordable Care Act.
- Incorporate learnings from prior investments.
- Refine outcome-area goals and strategies by developing 10-year strategic targets.

FIGURE 3 Grantmaking Approach

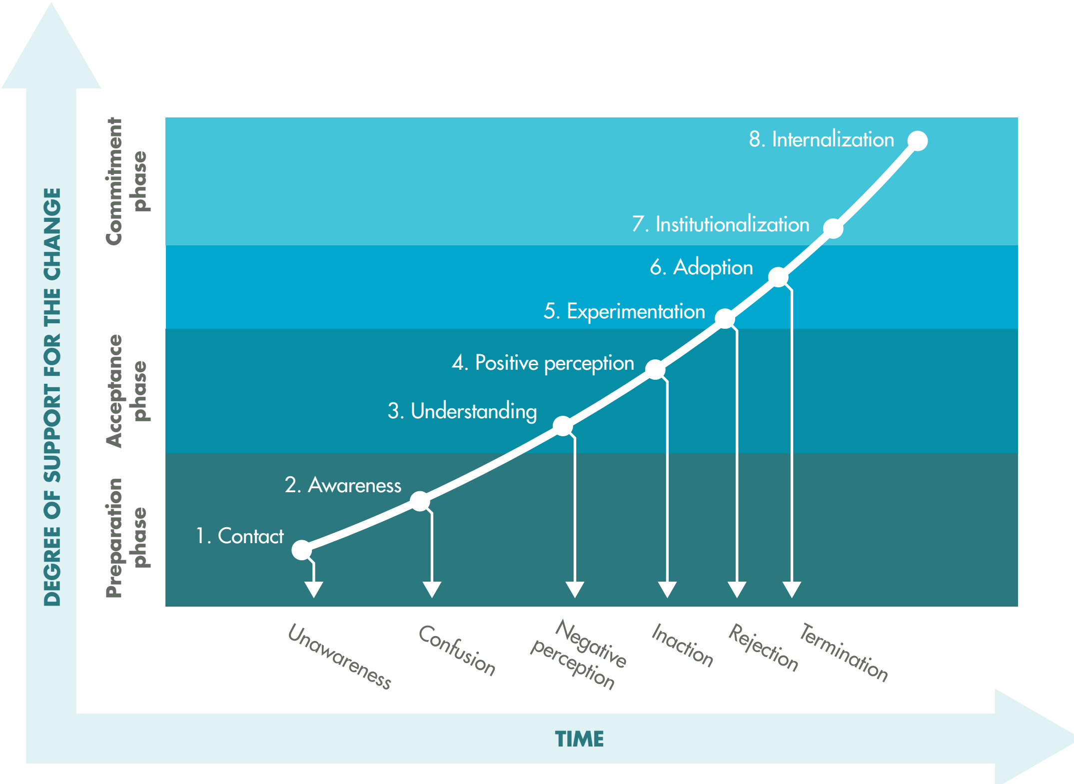
In late 2013, after extensive assessments, conversations, and engagement with local, state, and national experts and stakeholders, staff finalized the Strategy Refresh by proposing three major sets of changes. (See Figure 2.) The board approved the changes and new direction, along with a projected external launch date of March 2014 to communicate the changes. The three major types of changes were:

1. *Strategy and goals.* The foundation affirmed its vision and mission as well as a commitment to the three outcome areas of Healthy Living, Health Coverage, and Health Care. However, the strategies to achieve results within those areas changed. Seven new strategies were defined across the three outcome areas, each guided by a theory of change and numeric targets to guide the foundation's work. Three new galvanizing community-outcome goals were also set for the foundation to achieve together with grantees and partners by 2023.

2. *Grantmaking model.* As a grantmaker, the foundation had been predominantly responsive, meaning that any nonprofit organization working in Colorado could apply for funding during any of the foundation's three open annual deadlines. Grant portfolios centered on the three outcome areas, and grants were managed one by one. The foundation's vision for the future was a more targeted approach centered on creating strategic funding opportunities designed to accomplish specific outcomes, and which were aligned with a broader strategy. This resulted in a shift away from open, responsive grantmaking to an approach based on specific funding opportunities. (See Figure 3.) These funding opportunities tended to have specific criteria for applicants, and were open on more limited deadlines.

3. *Evaluation model.* Since 2008, grantees had reported progress to the foundation using the Measurable Results practice. Strategy Refresh brought an opportunity to reinforce the organization's commitment to evaluation and learning. As part of the foundation's strategic shift, a new evaluation model was designed and rolled out with the new grantmaking approach. The new model focused evaluation on portfolios of work within funding opportunities (including components beyond grantmaking, such as policy and communications), and the impact of the foundation's broader strategies. With the move away from grant-level measurement, Measurable Results became a small component of a much more comprehensive model. The new model was designed to provide

FIGURE 4 Commitment Curve



more actionable information for planning and improvement, a focus on intentional learning practices, and a more comprehensive focus on assessing impact even for difficult-to-measure activities, like advocacy and systems change.

Developing a "Change" Communications Strategy

Executive leadership[1] understood the importance of a well-devised communications strategy. They played active roles throughout design and implementation, but did not necessarily lead the effort. Instead, they provided input on design as requested and were deployed as key communications messengers, responsible for setting up critical staff and the board conversations and trainings. They played a similar role in external communications. An internal cross-functional advisory team comprised of middle-management staff (who represented the majority of staff direct reports) was created for primary decision-making and content approvals related to the communications strategy. One executive sat on the team as a conduit between executive and middle-management levels. The advisory team was well positioned to disseminate aligned messaging across staff, drive accountability for their direct reports' involvement in communicating, and develop support tools for a streamlined rollout. Prior to implementation, for example, the advisory team developed a process to track when and how external conversations occurred and to identify messaging gaps or trends to inform rapid improvements to the outreach.

The changes brought by Strategy Refresh were substantial, and the foundation knew that they would have a significant impact on current relationships and grants as well as on internal staff. The communications strategy was designed

[1]Note: executive leadership has since been replaced with a new CEO.

TABLE 1 Communications Strategy for Strategy Refresh

Communication Objectives	Guiding Principles
Provide awareness and understanding of the messaging.	Speak with one voice to drive aligned internal and external messaging.
Build and maintain comfort among staff and board to deliver messaging effectively and respectfully.	Develop clear messages.
Design all communications for consistency across all channels.	Be timely in sharing information and responding.
Actively manage communications to ensure aligned messaging and successful transition through the changes.	Prioritize face-to-face communications.
Apply learnings to improve communications through the transition.	Use existing communications channels and forums for subtle launch. Develop multiple opportunities for message delivery and reaction/response. Use a continuous and long-term feedback loop for responsive communications needs. Define measures to evaluate effectiveness.

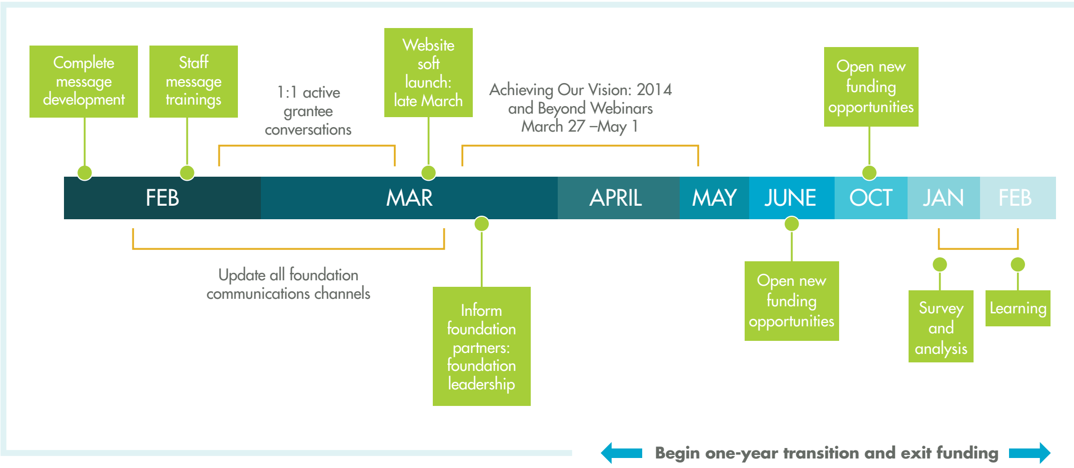
with a broad lens to ensure strong support for all audiences. The strategy outlined the approach and guiding principles for planning outreach, defined objectives to be met through communications, identified risks and assumptions, proposed an approach to measurement, and incorporated a learning approach to help improve communications.

The strategy was rooted in a traditional change-communications model that requires all users — those delivering the message as well as those receiving it — to move through a commitment curve, from awareness to commitment and action. (See Figure 4.) For example, it was expected that internal staff responsible for externally communicating the strategic changes would need to move through the curve before they could most effectively act as communicators to grantees and other partners. Executive leadership played a key role in that progression, setting expectations for staff involvement before and during rollout. Staff went through a training process that addressed acceptance of the changes before learning about how to effectively deliver messages.

Communications were designed to drive a successful transition through the change curve with both staff and external audiences. The objectives and guiding principles of the communications strategy were designed with an ultimate goal in mind: to inform, engage, and equip target audiences about and for a new foundation experience as grantees, staff, and board members. (See Table 1.) The guiding principles were co-developed with the program staff as part of planning the foundation's transition strategy, and served as a framework to help guide decisions about the overall communications strategy.

Tone played a critical role in achieving staff conversations that struck an honest balance of empathy and respect for the relationships with the foundation's valued grantees while conveying the

FIGURE 5 Communications Activities and Timeline



changes effectively. Underscoring all of this was a notion that being respectful included sharing honest information — news that can be hard to hear — with valued partners. Evaluation showed that grantees not only valued the individual conversations ahead of the external launch, but they also recognized the work and time that foundation staff put into that portion of the effort.

Developing a Communications Plan

The communications plan was the most frequently used by-product of the overarching strategy. It existed as a living document that guided daily work and activities. (See Figure 5.) The plan also functioned as the primary internal project-management tool, serving as a calendar and outlining the cascading approach to be used for communicating and reinforcing messaging to a diverse set of audiences, starting with internal staff. A cascading approach, which is typical in delivering messages via a change-communications model, allows for joint reinforcement of messaging, delivery through multiple aligned channels, and select delivery depending on audience (Lencioni, 2010).

The plan called for staff and board to first be prepared in February 2014 for the external communications launch. Simultaneously, other communications channels were outfitted to drive consistent messaging and integrated outreach.

Externally, a soft launch to the broader public was planned for late March 2014, followed by multiple opportunities to reinforce the upcoming changes. Shifts in the grantmaking model would take effect in June 2014, when the first funding opportunities would be open for applications. At this time, the foundation would fully shift from responsive applications to applications based on funding opportunities.

The primary communications channels were varied. Prelaunch, they included one-on-one conversations with every active grantee, a personal letter from the chief executive officer to each active grantee, and print collateral for internal use and for grantees. At the launch, the channels included the revised and restructured website; the *Achieving Our Vision: 2014 and Beyond* webinar series; email announcements; and additional one-on-one meetings with key partners and the local philanthropic community.

Implementation of the communications outreach was staggered over the course of a year. In addition to guiding and monitoring daily activities, the communications plan was used to identify audiences, develop key messages, prepare staff to communicate messages, and outfit channels to communicate the changes more broadly. Evaluation of the communications effort rolled out in January 2015, less than a year after launch.

TABLE 2 Communications Changes to Key Audiences

Type	Stakeholders	Impact	Communications Function	Owner
External	Active grantees	High	Inform and engage about the organizational changes, the independent impact to them, and future funding or activities.	Program officers, Foundation leadership, Foundation communications
	Key partners	High		
	Philanthropic community	Medium		
	Vendors	Medium		
Internal	All foundation staff	High	Inform staff about the organizational changes and provide varying levels of training to effectively communicate the changes; function as a feedback loop.	Foundation leadership, Foundation communications
	Graduate medical education staff	Medium		
Governance	Board	Medium	Inform governance about the organizational changes and provide training to effectively communicate the changes; function as a feedback loop.	Foundation leadership, Foundation communications
	Philanthropy committee	Medium		
Foundation Staff Groups	Internal cross-functional advisory team	High	Approve and implement communications planning.	Foundation leadership, Foundation communications
	Philanthropy team	High	Train program officers to have one-on-one conversations with affected organizations.	
	Leadership	High	Train leadership to have one-on-one and group conversations with affected organizations and partners.	

Identifying Target Audiences

The foundation's communications philosophy is grantee-centric, with priority placed on both robust customer service and sharing or cross-promoting information related to grantee programming and efforts where the foundation invests. Because grantees and key partners were consulted for feedback in various ways throughout Strategy Refresh, there was awareness of potential foundation organizational shifts among the larger statewide nonprofit community. Key partners across the state, including the Colorado-based philanthropic community, were also aware of Strategy Refresh to some degree.

Building on external awareness and interest in the shift, the foundation realized the importance of sharing timely information about the upcoming changes to address concerns or anxiety. Sharing the appropriate information with key audiences at the right time was key to effectively carrying out a coordinated announcement and transitioning through the changes. (See Table 2.)

The decision to focus on grantees and key partners as two primary external audiences emerged naturally. Internally, the primary audience was staff; governance bodies, including the board, were prepared similarly.

TABLE 3 Internal Staff Change Impact Survey Results

Survey Topic	Staff Responses
Degree of change	61% medium, 39% high
Most significant changes to address	Changes to funding, new evaluation expectations, clearer understanding of application fit earlier in the process, increased requests to other funders
Staff concerns	How to maintain and preserve relationships, how to communicate effectively
Keywords identified by staff to describe the future state	Intentional, targeted, strategic, thoughtful, precise, concentrated, fine-tuning

Developing Key Change Messages

Messaging for this effort was designed to help messengers create authentic conversations that conveyed consistent information. Staff and board needed a strong, yet easy-to-recall narrative about the changes. Creating staff buy-in of messaging started with their feedback. The advisory team developed an internal survey that identified how staff viewed the changes thus far. The survey results informed development of appropriate messaging tools. The findings revealed how staff viewed target audiences and which changes would have the most impact on those audiences, and assessed current perceptions about the foundation's anticipated future approaches.

When the survey revealed that staff considered the degree of change to be significant, staff focus groups were organized to dive deeper into the results and better understand staff concerns about how to effectively communicate. (See Table 3.) The survey identified key trends that were eventually translated into primary response messaging, while executive leadership identified change management as a key area for support internally. It is important to note that no messaging was tested externally prior to launch. While that would have been ideal, timing did not allow for it. There was also real concern about ensuring consistent communications once we began talking about the organizational changes, which led to some caution about using a testing approach at this point in the strategy. Messaging was tested for feedback post-launch, however, and foundation staff now test communications more regularly.

The strategy's cascading approach prioritized staff readiness for verbal and written communications. While a message platform informed content updates across communications channels, the three core sets of change (strategy, grantmaking approach, evaluation) proved somewhat challenging for staff to recall and effectively convey. To address this challenge, multiple memory devices and conversation tools were developed into a messaging toolkit:

- A story mnemonic device helped staff members memorize a string of words and frame a conversation. It also drove understanding of and consistency in messaging. The tool model focused on boiling down a story to basic points. The resulting mnemonic told a story of change in four words: review, recommit, refine, and results. (See Figure 6 and Figure 7.) For staff, achieving a comfort level with the messaging was critical. As they became more comfortable with the messaging, they were advised to personalize the individual conversations in a way that felt authentic to them. This proved to be an important tool for staff and leadership who were having regular conversations about the changes. Evaluation later showed that grantees achieved a

FIGURE 6 Message Tool: Boiling Down Your Story

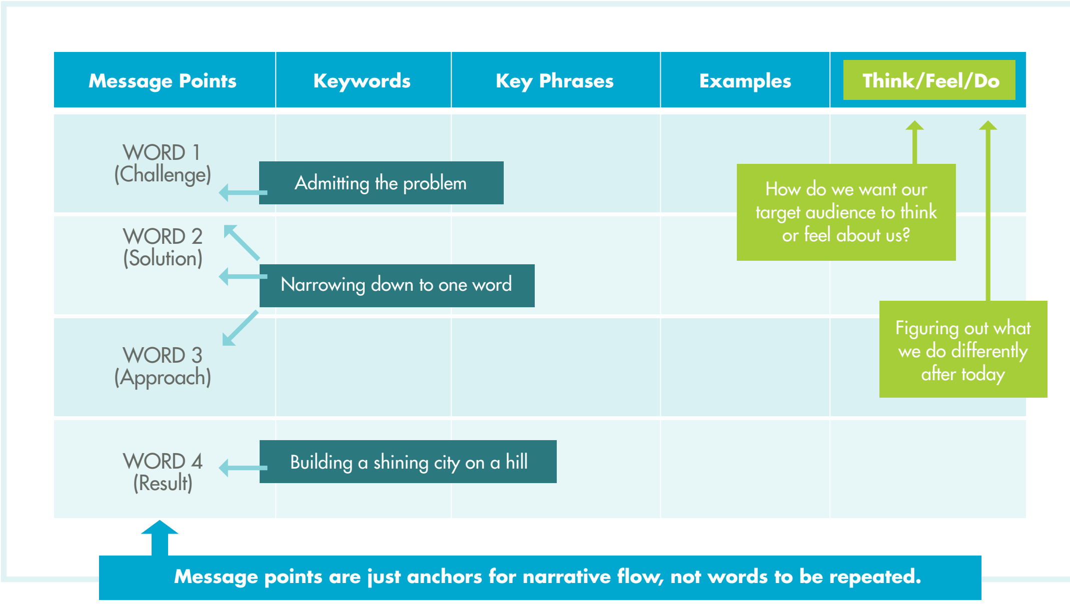


FIGURE 7 Resulting Mnemonic Meesage Tool

Message Points	Keywords	Key Phrases	Facts & Examples
REVIEW (Why)	• Reflect • Rethink • Examine • Change • Reposition	• Meet changing needs; react to shifting landscape • Learn from findings; incorporate learning	• React to shifting health care landscape (Affordable Care Act) • Build on past success • Engage with partners, grantees in long-term planning
RECOMMIT (What)	• Commitment • Vision • Aspiration	• Update our approach • Recommit to our community outcomes • Remain true to our values	• Invest in three outcome areas • Expand ways to engage
REFINE (How)	• Target • Focus • Revise • Tailor • Proactive	• Narrow and sharpen focus • Tailor funding approach • Target investment against goals	• Clear goals allow for more precise strategies and measurement • Focus on children, geography, and other refinements creates more impact
RESULTS (Future)	• Impact • Future • Successful • Healthier	• Show greater impact • Move the needle • Meet our goals • Make an even bigger difference • Create new partnerships	• Continue responding to community needs • Engage across sectors

FIGURE 8 Comparative Content Tool: What's Changing in Healthy Living

What We Currently Do	What We Plan to Do
Focus on all ages	Focus on kids
Primary focus on K-12	Expand to early childhood through 12th grade and out-of-school settings
Work on health education, chronic disease management, healthy eating, and active living	Prioritize healthy eating and active living
Statewide reach	Geographic focus

pretty clear understanding of what they were attempting to convey.

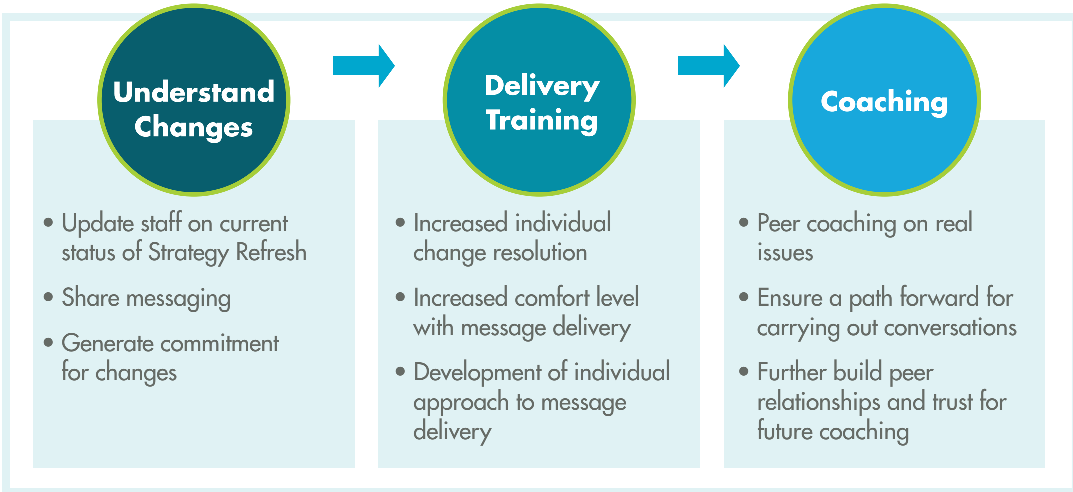
- A conversation flow tool helped staff structure anticipated conversations, from introduction to questions and closing. The tool provided a simple path for staff to follow no matter what shape the conversation took. Following the path, and simplistic recall-driven pivots and bridges to drive the conversation, enabled the staff member to remain in control of the conversation and deliver the information while remaining open to answering the grantee's questions. This tool also proved useful to staff, particularly in setting the tone for early conversations.

- An impact conversation map across the primary audiences was a key tool in managing challenging conversations and ensuring that personal conversations took place with every grantee. With hundreds of grantees across the state, an equal and higher number of conversations would be necessary to convey the changes. Potential funding impacts and changes to evaluation reporting requirements were identified as the biggest concerns to address. In some cases, multiple conversations were expected. A funding impact messaging map was developed to guide staff through conversations that varied by degree of impact. The map outlined for the user how to define the anticipated impact level for that particular grantee, goals of what to communicate in the conversation, tone expectations (such as being firm or compassionate), and explanations of what the grantee could expect moving forward, and next steps.

- Comparative content tools helped showcase the degree of shifts resulting from Strategy Refresh (e.g., with the Measurable Results). (See Figure 8.) Presenting content comparatively by time frame proved to be useful in helping grantees understand the breadth of change, particularly among longtime grantees and partners. During webinars, for example, comparative content was noted by attendees as being visually appealing and clear in terms of showcasing the before and after states.

- Conversation-planning worksheets guided program staff and others as they planned for one-on-one conversations. The worksheets were used during peer-coaching sessions among program officers and trainers. Some staff used the worksheets to map the conversations they viewed as most challenging. Later, staff shared that they gained confidence but, more importantly, that they found comfort through the peer coaching, inadvertently addressing some of the emotional challenges of understanding the breadth of the changes.

FIGURE 9 Staff Training Design



Training Stakeholders

Preparing the staff and the board for external communications was a critical stage in planning. During this period of time, the foundation employed 61 full-time staff and 56 employed staff of a primary-care residency-training program, achieving a controlled and consistent change message was both a risk and tremendous challenge. Approximately 35 foundation staff members would be serving as the most prioritized communications messengers for this outreach effort.

Staff training objectives mirrored the commitment curve. They focused on moving staff from a strategic idea to a narrative, and then helped align around how the narrative is shared. (See Figure 9.) The first step in training was to ensure staff understood the changes themselves. Leadership led this portion of the training using the messaging tools developed for staff to use when training for consistent delivery. Staff then underwent a delivery training exercise that prepared them to move primary audiences through the commitment curve. The third step focused on peer and personal coaching to assist staff in practicing for anticipated conversations and instill emotional support among staff members.

In this rollout, board members were considered brand ambassadors who both communicated externally and served as a feedback loop to staff. Board-member training was similar to staff training, but focused on understanding the changes and receiving concise messaging support; for example, an "elevator speech" that articulated a concise, clear message was provided for the board to use in its external communications.

Carrying Out the Change Communications

External outreach began in late February 2014. The foundation provided numerous and varied opportunities to communicate with grantees personally and online, which evaluation results later confirmed as an effective approach. These reinforcing communications activities were designed knowing that grantees, nonprofit staff, and board members would benefit from hearing messages repeated through multiple channels.

During a two-week period, program officers communicated the changes to more than 300 active grantees through individual conversations, either by phone or at in-person meetings. Before the launch, the foundation had organized active grantees by the duration of expected continued funding. "Transition" grantees were told that funding opportunities could open in the near future and they could likely apply for a new grant. Some grantees were considered for "exit" funding and notified that they would have some period of continued funding, but that after that they would be eligible to apply through new funding opportunities. Renewal funding in many cases was awarded for more than a year. While funding opportunities were beginning to roll out in June 2014, the foundation had not yet settled on what types of funding opportunities would be available at what times. The communications plan called for parallel and ongoing opportunities for grantees and interested applicants to continue talking directly with staff to understand the new funding options.

One-on-one discussions were tracked to ensure all grantees were contacted and to identify follow-up requirements. During these discussions, communications staff advertised an upcoming series of live webinars that would provide an overview of the core program changes and allow time for participants to ask questions. In late March, the foundation's president and CEO followed up with a letter to grantees, outlining and reinforcing the conversations from earlier in the month.

While grantee conversations were underway, the foundation's primary communications channels were outfitted for the external launch. The foundation's website[2] was (and is) its most centralized communications tool. Given that the website's primary traffic source is people interested in funding, the content had to reflect the new messaging for a streamlined user experience. To meet this objective, the site content and structure were redeveloped and launched on March 28, with the most up-to-date content and news related to the changes.

The *Achieving Our Vision: 2014 and Beyond* live webinar series reviewed the changes and gave viewers an opportunity to ask questions of staff members. The first webinar was on March 27 — the day before the new website launched — exclusively for existing grantees who had already been engaged directly by program staff. That webinar was a reinforcement mechanism to underscore messaging. Four more live webinars were hosted through early May. More than 200 individuals participated the series and dozens more watched archived events. Webinar participants were surveyed to gauge how well the changes were being understood. Participants consistently shared that the presentation was well done and easy to understand, was responsive to questions, and offered "good anticipated follow up."

Email marketing is an important channel for reaching large foundation audiences with important funding information and organizational updates. On March 28, the foundation announced the changes via email and shared links to the new website and the recently archived webinar from the day before. Subsequently, email has proven to be the most effective vehicle for sharing information about funding opportunities, leading to a more than 150 percent uptick in email marketing. Social media also served as a channel to advertise opportunities to learn more about the foundation's changes.

A series of in-person meetings were held between among foundation leadership and key partners and the philanthropic community. On April 28, the first two funding opportunities were launched on the website for applications due June 15. Additional opportunities opened in June and in October.

Throughout the remainder of 2014, multiple needs for rapid-response communications emerged. Program staff soon learned that visual aids were key to follow-up conversations. Wall posters were developed for staff to easily access key information related to the changes. As funding opportunities took shape, advertising needs increased and program staff reached interested applicants directly via webinars. Staff also received additional messaging support prior to major foundation events during the remainder of the year. Messaging was tweaked when some points required clarification, but the original messaging tools remained intact. By December 2014, the primary advisory team was ready to begin an evaluation process.

[2]See www.ColoradoHealth.org.

TABLE 4 Summary of Grantee Surveys

Survey Finding	Emergent-Learning Application	Updates Since 2015
Overall, the foundation achieved awareness and clarity. Grantees confirmed that the change communications made them aware of the foundation's changes to strategy and grantmaking. In general, they said communications were clear.	This finding emphasized the importance of the multipronged communication strategy. The objectives related to clarity and aligned messaging were clearly met to some extent.	Communications continue to be tailored to grantee input on a regular basis, including the webinars and website in some fairly substantial ways. A 2015 Center for Effective Philanthropy grantee survey reinforced that grantees continue to have a fairly clear understanding of the foundation's work.
The foundation could be clearer about long-term plans for grantmaking. Grantees said that a longer-term view of upcoming funding opportunities would benefit their planning and decision-making (e.g., what funding opportunity to apply for and when).	An external funding opportunity calendar was developed to provide a longer-term view. A testing feature was built into the calendar's development, focusing on format, utility, and content. Anyone who opted in to testing via the survey was included. Other communications vehicles, such as applicant information and grantee-orientation webinars, were revised to clarify current and future funding opportunities.	Changes to funding, new evaluation expectations, clearer understanding of application fit earlier in the process, increased requests to other funders
The foundation's vision for community engagement could be clearer. Grantees said they would like to understand how the foundation engages the community. They also want to feel engaged as active partners to inform decisions.	The foundation recognized the importance of sharing more clearly how grantees are being engaged, and to understand more about how they want to be engaged. Intentional feedback opportunities are increasingly being offered, particularly through events that grantees attend.	The foundation has recently engaged in a statewide listening tour to understand further how communities view assets and barriers to health in the areas in which they live, work, and play.

Evaluation and Learning

Evaluating the effectiveness of the change-communications strategy through direct feedback from the target audiences was critical to assessing how well the changes were understood and where gaps existed. The foundation's evaluation team designed an evaluation approach that involved a post-outreach survey and an emergent-learning process to critically assess and apply the survey findings.

In January 2015 the foundation conducted a survey of grantees, including all active grantees who had been contacted in the previous year and anyone who had applied for a funding opportunity the prior June or October. (See Table 4.) The survey also provided an opportunity for people to opt in for future focus groups and message testing to help the foundation further improve communications. In February 2015, the survey results served as the basis of an emergent-learning session that was designed to help staff debrief what had happened, test their assumptions, and agree on specific ways to improve communications.

Emergent learning is a practice developed by Fourth Quadrant Partners[3] and designed to help reality-test assumptions, adapt practices mid-course, and accelerate results (Signet Research & Consulting & Fourth Quadrant Partners, n.d.). The foundation had adopted emergent learning as a core practice of its evaluation approach in 2014, but this was the first time it had been used with a group of all-staff at the foundation. The session was designed to help staff address the question: What do we now know about communicating effectively with grantees? The evaluation team led the session, which asked staff to think through four quadrants: data (what actually happened); insights (what does this mean to you?); hypotheses (if, then); and opportunities. The data quadrant contained information from the survey, and during the session staff contributed their stories about internal and external Strategy Refresh communication. During the session, staff tested their insights and developed hypotheses about what actions would advance results. They came away from the session having identified immediate opportunities to put their learning into practice in order to improve communication. The following details emerged from the survey and emergent-learning practice:

- The communications tended to result in grantees being aware of the changes and finding the communications to be clear. Overall, 90 percent of grantees were aware of the strategy changes and 86 percent were aware of changes to the grantmaking model. Eight percent said they did not know about either change. A key learning was that the use of multiple communications channels and repeated communications, including personal outreach, were effective in getting the word out.

- Generally, grantees rated communications fairly highly, but grantees whose work did not have clear alignment with the new strategies — referred to as "bridge" grantees — appeared to have less clarity compared to other grantees. The bridge grantees said they felt heard and respected, but across channels were less likely to report that communications were "very clear." Staff also reported that discussions with bridge grantees were very challenging because specifics were not known about the availability of a particular funding opportunity that would be a good fit with the grantee. A key learning was that a longer-term view (e.g., three years) of strategies and funding opportunities could help staff more effectively communicate this with grantees.

- Generally, grantees who were told that they were no longer a fit or that they might fit with a future funding opportunity said they were appreciative of the personal outreach, felt heard during the process, and felt respected. There was also some confusion, however, about why grantees were no longer aligned. A key learning was that the foundation's decision to personally reach out to all grantees was important. It resonated with grantees and demonstrated a commitment to them that was reflected in the fairly positive data. On the flip side, the foundation recognized that there could have been more clarity internally about how alignment was determined. This lack of clarity created confusion both internally and externally because it made it difficult to communicate with grantees about the future.

- Grantees reported varying levels of clarity about the foundation's future. Almost a quarter of those surveyed said that the foundation's strategies and grantmaking approach were less clear now than previously. A key learning was that the foundation could have acknowledged more intentionally that not all of the answers were known, and that more time was needed to figure out some details.

- Some grantees perceive the foundation's changes as lacking in community

[3]See www.4qpartners.com.

engagement. Staff shared concerns that grantees felt the foundation's focus was geographically lacking, and more recent analysis of funding opportunities shows that the foundation could do a better job of engaging rural and nontraditional grantees. A key learning focused on the notion of having a clear community engagement strategy. Close to press time for this article, the foundation completed a statewide listening tour to hear how communities view health barriers and assets. Also, new staff was hired to focus on community engagement.

Lessons for Communicating Change

Communicating effectively about the foundation's organizational changes represented an important shift in the organization's evolution and proved to be a significant learning opportunity. There is evidence that the changes are taking hold and that grantees generally have a clear understanding of how to receive funding from the foundation. A Center for Effective Philanthropy (2016) grantee-perception study conducted in 2015 revealed that the foundation has effectively communicated goals and strategy to grantees, and provided consistent information across different personal and written resources. In addition to assessing the effects of the Strategy Refresh change-communications strategy, the evaluation identified general lessons to be used when communicating organizational shifts that have significant external impact:

- Use communications strategy as a key component in organizational change. Having an established set of communications channels, along with staff and executive leadership buy-in to use communications strategically, were critical assets to the change strategy. Perhaps equally important was the communications strategy itself, to guide the cascading approach required for consistent and timely communication of complicated information. The strategy prepared front-line staff to effectively communicate change that had varying levels of impact on the statewide nonprofit community. For organizations with less executive buy-in or fewer established communications channels, it would be important to address those gaps from the outset and focus on a strategy that works for the situation. Effective communications can still be achieved and measured with few channels, because the strategy can account for that by preparing the few channels that are the most important. Executive buy-in is critical to success for the organization, not necessarily just the communications strategy. It could be important to emphasize the mission link more heavily to drive executives to support and participate in the strategy. While communications can solve for ambiguity in how change is described, it does not take the place of actually making strategic decisions for an organization. A real challenge in all change communications is getting comfortable with not having all the details figured out. In this example, there were details not yet determined about the organizational strategy that proved challenging for staff to talk through. This issue was addressed somewhat through communications, but has remained a separate and important body of work for staff in holistic change management.

- Employ multiple communications channels and repeated communications to reach grantees and partners. Repeated use of integrated communications to share messages is a proven practice, but it can be challenging if an organization does not have experience in or established multiple communications channels. Most grantees reported knowing about the variety of communications channels they could use to get information about the foundation's changes. Exit grantees in particular were heavy users of these channels. Identifying and adopting key channels for external use and long-term engagement strategies are important to enhance the likelihood of success. For organizations without dedicated communications staff or multiple established channels, one option is to hire a communications firm to analyze where and how communications can have the most impact. Investing in some type of

In general, an organization preparing to announce substantial changes should identify early in the process any points where it is still determining a direction. This will both prepare as much as possible the staff and others responsible for communication, and get them comfortable with sharing information that may be somewhat ambiguous. The point of communicating is less to have complete clarity at every moment than it is to make an audience as satisfied as possible so they can use that information effectively.

infrastructure for mass communication is critical to ensuring key audiences understand change.

- Be upfront about what isn't known and provide a clear timeline for when it might be known. A key issue in communicating was that the foundation had a view of its 10-year goals and the funding opportunities for 2014, but did not have a view of what funding opportunities would be available in the more intermediate term (2015–2016). Both staff and grantees said that a longer-term view of what funding opportunities would be opening in the future was needed to effectively communicate information to grantees. In general, an organization preparing to announce substantial changes should identify early in the process any points where it is still determining a direction. This will both prepare as much as possible the staff and others responsible for communication, and get them comfortable with sharing information that may be somewhat ambiguous. The point of communicating is less to have complete clarity at every moment than it is to make an audience as satisfied as possible so they can use that information effectively. Messaging can be developed to address ambiguity, but it does take planning and enforcement.

- Determine alignment for impacted audiences and their work before communicating. The evaluation data clearly indicated that the foundation's decision to have program staff personally contact all grantees was important and demonstrated a commitment to grantees. Internally, however, staff recognized that more clarity between grantees considered "exits" and "transitions" would have been very helpful. Given that staff did not know what funding opportunities were going to be available, it may have been more helpful to encourage all existing grantees to look for other funding sources, rather than trying to predict which organizations were likely to be a future fit. Testing messaging is one solution to this issue. Had the foundation tested alignment messaging, it likely would have determined earlier that a more global message was the better solution. Message testing can be conducted in a fairly simplistic fashion. For organizations without dedicated staff, this could be a good opportunity to invest in a communications professional or firm. Organizations with communications staff can position their messaging for regular testing by allowing key audiences to opt in to focus group or other testing opportunities. The foundation allowed grantees to opt in to test messaging and products during a regular survey. The opt-in grantees are regularly tapped with simple testing exercises that require, for example, their perspectives on comparative statements or questions about how they react to certain words and terms being used in messaging that may be important to them as an audience.

- Be clear about the community engagement approach used in the strategy that is being communicated. During Strategy Refresh, foundation staff made an effort to engage grantees in a variety of ways, such as focus groups and advocate engagement. However, staff recognized post-survey that a clear strategy is important for understanding what community engagement means and looks like for the effort (i.e., purpose of engagement, who is involved, when change will occur) so that they can clearly communicate. In particular, engaged parties should always be given feedback about how their involvement impacted a particular process or product. Organizations of all sizes should consider how and why they engage externally for input in developing strategy. Documentation of the approach can be useful, especially because input may take place throughout strategy development. When and if a communications strategy is incepted, it is critical to integrate community engagement as much as possible. This can take the form of, again, message testing. When any audience is tapped for input, it is important to regularly communicate with that group, and to be consistent across the group. Finally, staff responsible for community engagement will likely be very important stakeholders in development and implementation of a communications strategy. Consider working with those staff early as key advisors.

- Evaluate and learn to assess how well communications are understood. In this effort, establishing an ongoing feedback loop through the evaluation and learning model was important to understand the degree to which the strategy was effective, and to help apply learning to improve future outreach. The foundation has used the emergent-learning process repeatedly since the communications strategy launched to learn and improve communications of all types. Equally important, however, was the commitment early on to evaluate and learn about how well it communicated. There is a vast array of tools available to apply measurement and learning, ranging from free online templates to hired services or in-house evaluation staff. Committing to evaluation early in the design of any change-management process can keep staff focused on what success could look like, and show clearly where benchmarks were not met. Whether an organization is open to "learning" or not should not overshadow its ability to understand how well its changes are received or perceived. In this case, a commitment to evaluation and learning from the outset was critical to normalizing some of the change with staff who were unsure about how this might impact external audiences. It did not solve for strategic decisions, but it helped audiences understand that the foundation was making a clear effort to communicate well, not perfectly. Sometimes, saying that directly is the best choice an organization can make with regard to its tone and overall appeal to audiences in understanding complicated information.

RESULTS

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