THE COLORADO TRUST

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STRATEGIC LEARNING

FROM PAPER TO PRACTICE:

Key Lessons for Foundations Deploying Complex Strategies

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THE COLORADO TRUST
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NOTE FROM THE COLORADO TRUST

In 2010 The Colorado Trust launched Project Health Colorado, a statewide effort to build public will to support access to health for all Coloradans. We engaged Spark Policy Institute to conduct a learning-focused evaluation of this project. The findings from this evaluation can be found online at www.coloradotrust.org.

One of the evaluation questions asked what lessons The Trust might consider were we to undertake such a project again. However, the evaluation resulted in findings we believe can inform a broader audience than the public will-building field. This report, written by the independent evaluator together with The Trust's program and evaluation leads on the project, helps inform other foundations implementing a variety of complex grantmaking strategies. These lessons have been valuable to us as we developed subsequent advocacy grantmaking, and we hope they will be to you as well.

INTRODUCTION

As the philanthropic field continues to explore ways to increase impact and improve outcomes, more attention has focused on models that prioritize supporting grantee cohorts and collaborative efforts with shared intent over individual grantees and isolated projects.[1] Public policy grantmaking, field-building, collective impact and public will-building all offer ready examples of these kinds of complex models and approaches.

In advocacy and public policy grantmaking, funders have looked to targeted approaches to achieve more substantial, long-term changes in the policy landscape, including supporting niche policy issues or advancing specific policy goals.[2]

Field-building strategies have prioritized developing and supporting long-term capacity in a particular issue domain, relying on a shared identity within an issue area, common standards of practice, a shared information base and support for leadership and grassroots activities.[3]

Collective impact models have included establishing a common agenda, identifying a backbone organization, developing shared measurements, and implementing mutually reinforcing strategies and tactics. Other models that have emerged over time include funder collaboratives, public-private partnerships, multi-stakeholder initiatives and social sector networks.[4]

Public will-building approaches—which focus on attitudinal shifts and behavior change in a particular issue area—are complex in design and structure, require long-term commitment and generally comprised of a combination of many strategies, including engagement, advertising, clear communication, partnerships, grassroots mobilizing and more, to "engender a shared priority and turn belief to action."[5]

While each of these models and approaches has their own nuances, they have many commonalities in how they are planned and implemented. Each model, in one way or another, relies on established, high-performing organizations coming together with some shared intent, and building skills and capacities that support and advance a collaborative approach.

This report explores those commonalities through the lens of one foundation's experience in implementing a complex, multi-year public will-building strategy, and what that experience suggests be in place for effective implementation. The findings highlighted in this report are specifically intended for staff of foundations and other organizations interested in learning about the deployment of strategies that rely on building a cohort of established organizations to pursue a shared intent.

THE PUBLIC WILL-BUILDING STRATEGY

In 2008, The Colorado Trust, a grantmaking foundation with a mission to advance the health and well-being of all Coloradans, established a new vision to achieve access to health by 2018. It was a bold, 10-year commitment to both expand coverage and increase the availability of care to all Coloradans.

As a central component of its new vision, The Trust designed and implemented what later became known as Project Health Colorado (PHC), a three-year, $9.6 million grant strategy to build public will to achieve access to health for all Coloradans, which included a $2 million contribution to grants from the Colorado Health Foundation.

Formally launched in 2010, this ambitious undertaking was comprised of a multi-faceted strategy aimed at increasing awareness, understanding and ultimately support for the kinds of policy changes needed to expand health coverage and increase the availability of care. At the center of this strategy was the concept of public will-building, an approach that relies on a multitude of integrated strategies and tactics that, over time, help to shift attitudes and behaviors around a particular issue or set of issues. It was intended to be a decade-long effort to help change how people think and act about improving access to health.

Building public will is not a short-term or one-time campaign to build support for one piece of legislation, one ballot initiative or even one policy objective. A public will-building approach encompasses a myriad of complex components, including connecting people to an issue through their existing values, fostering a sense of ownership and commitment and ultimately translating these sentiments into viable actions. Ultimately, these actions lead to the development of a strong network of organizations and supporters that demand and support social change.

THE FIVE PHASES OF BUILDING PUBLIC WILL[5]

PHC was a first step in this extended process to build public will, where changes are longer term, may take years before they evident and may not come in the form predicted.[6]

The PHC strategy included the key tenets of a public will-building approach: on-the-ground engagement strategies in the form of grantee partners supported by shared messaging and an overarching communications and engagement strategy. Following an open, competitive, two-step application process, The Trust selected 14 grantee partners from more than 100 applicants to receive three-year grants of up to $400,000.

The PHC strategy included the following components:

Grantee Partners. The grantees selected proposed to reach different audiences through different strategies in different geographic locations. This blend of audiences, strategies and environments were aligned with the public will-building concept of shifting attitudes and behaviors over the long term. Many organizations relied on community forums, one-time events, newsletters, web content, story collection and dissemination, and social marketing tactics to engage their participants briefly and encourage them to be aware, learn more and perhaps take a small action. Other organizations engaged core groups of volunteers in intensive training and provided substantial support to allow those volunteers to incite others to action.

Shared Messaging. A communications firm, Spitfire Strategies, developed a common message framework for grantees based on focus groups with key audiences and an early benchmark poll. The message framework was later refined with subsequent public opinion research, and adapted for different key audiences based in part on grantee

feedback. It was intended to reinforce key themes and resonate with key audiences by connecting with their existing values. Shared messaging was heavily supported through coaching, technical assistance, training and peer-to-peer learning.

Convenings. Grantees were required to attend and participate in regular convenings to gain further understanding of the public will-building approach, develop skills for grantee staff and connect with one another to strengthen and expand the grantee network. Convenings, alternating between in-person meetings and virtual webinars on a quarterly basis, also provided a venue to identify emerging needs, challenges and opportunities to refine and improve grant strategies and activities.

Paid Media and Mobilization. A paid media and mobilization strategy was designed by marketing and communications firms Cactus Marketing Communications and SE2 to augment and amplify the work of the grantees, and engage more Coloradans than any one grantee organization could. These components included a statewide advertising campaign, interactive website, email and mobile messaging campaign and street team canvassers deployed at large public events. The paid media and mobilization components were implemented more than a year into the overall strategy.

Strategic Learning. A real-time strategic learning component was embedded in Project Health Colorado with assistance from Spark Policy Institute. This was designed to assist grantees and The Trust in testing and adapting strategies to improve outcomes. It engaged grantees and The Trust in the use of systematically collected data to steadily assess whether strategies were moving audiences in the ways intended, adapt the strategies and assess again.

Adaptive Strategies and Resources. Early in the strategy, decisions were made to remain adaptive in this effort, both in strategies as well as in how resources were deployed. This led to the ability—both for The Trust and for grantees—to shift strategy in response to strategic learning or other new information.

Evaluation. Spark Policy Institute conducted the PHC evaluation, which contributed most of the data found in this report. The evaluation explored the overall implementation of the strategy and its ability to move audiences through the public will-building stages of awareness to conviction and action. This report draws on a subset of information focused on strategy implementation. The evaluation methods that contributed to this report include the following:

- Message framework analysis
- GIS analysis of messenger distribution
- Analysis of grantee learning reports
- Cross-survey analysis of grantee convening feedback surveys
- Project Health Colorado tracking data
- Time trend analysis
- End-of-grant grantee staff survey.

Additionally, a document review was conducted on source materials provided by The Trust that included board reports and updates, initial strategy development materials and interim evaluation reporting.

Finally, a number of experiential and observational lessons were drawn from Trust staff, consultants and feedback provided by grantees themselves.

STRATEGY DEPLOYMENT AND INSIGHTS

The Trust's experience with the PHC strategy is instructive for other similar models and approaches, particularly for funders who are engaging their grantees in a shared intent with high expectations for how they will engage. The evaluation findings highlight risks and opportunities associated with bringing together diverse, high-performing organizations in a series of mandatory activities to build a shared approach, and supporting and permitting a high level of adaptation and learning.

STRATEGY #1 GRANTEE SELECTION AND STRUCTURE OF COHORT

A major decision-making point in any grantmaking strategy is the types of grantees that will be included in the strategy. Some cohorts are fairly homogenous, such as a field-building strategy focused on a service delivery network, but many large collaborative strategies necessitate a diverse array of grantees.

The Trust's Approach

In the application process, The Trust sought out prospective grantees that were established organizations, held some demonstrated experience in this domain and expressed a capacity to appeal to a number of different key audiences identified through public opinion research, including Latino and African-American communities, low- and middle-income families, women, young Coloradans and older Coloradans.

Given the breadth of the issue and the expanse of key audience demographics, The Trust selected a grantee cohort comprised of organizations that engaged in distinct activities, with each grantee representing different types of strategies and tactics that reached audiences in different ways and in different geographic environments. Grantees included advocacy organizations, community organizers, service providers, coalitions, media organizations and others.

It is important to note that, while The Trust sought out "established" organizations with experience in the advocacy, leadership development and public-will domains, there were no applicants or selected grantees that could be considered a "public will-building" organization.

Key Learnings

IMPLICATIONS OF MANAGING A DIVERSE COHORT: The diversity of the grantee cohort had implications for the level of support provided by the foundation beyond the funding itself. The Trust staff were highly engaged in different ways with the many organizations, adapting to their level of readiness, understanding of the strategy, buy-in to the strategy, and even the political climate of the geographic area in which they were deploying their public will-building strategies.

FACTORS ASSOCIATED WITH POSITIVE GRANTEE OUTCOMES: The evaluation findings identified that grantees with any two of the following three factors had much more positive outcomes:

- STRATEGY: Grantees that were implementing a strategy that was well-known to the organization, including being tested or refined in the past.
- STAFFING: Grantees that had a high level of reliance on existing staff to implement this specific work and low turnover of staff in general.
- SYMMETRY: Grantees that had a high level of buy-in, engagement and prioritization of messaging, strategic learning and grantee partnerships, all core elements of the strategy design.

The evaluation findings do not assert that these factors are necessarily predictive. Rather, this combination of factors suggests that stability and knowledge of the strategy, either present from the beginning or gained through a high level of engagement in learning along the way, matter tremendously.

However, if there's an absence of one of those factors, the other two can help overcome the gap. For example, strong buy-in can help surmount weaknesses in staffing or experience, but not both. It also suggests that a lack of buy-in or symmetry may not be that problematic if the grantee staff and strategy are both well-established and stable.

STRATEGY #2 REQUIREMENTS OF GRANTEES TO BUILD SHARED APPROACH

Tools for alignment are critical in any effort to engage a large group of organizations in working together on a shared intent. In the context of a funding strategy, these tools become part of the requirements for grantees. For The Trust, tools included a common message, grantee convenings, and engagement with the paid media and mobilization campaign.

The Trust's Approach

Common Message: The Trust invested in a common message framework for PHC because the effective, consistent and continuous use of shared messaging is a key mechanism of public will-building, and is applicable to other approaches. The shared messaging component in PHC was heavily supported through coaching, technical assistance and training, and was one of the primary recommendations incorporated into the development of a public will-building strategy based on preceding research and other best practices.

Grantees Convenings: The Trust incorporated regular, required grantee convenings—both in-person and virtual meetings—into the strategy as a way to maximize the impact of individual grantee efforts by providing venues to share ideas, align around common efforts, gain skills and understanding and strengthen the network of grantee partners.

Paid Media and Mobilization Campaign: A critical aspect that differentiates a public will-building effort from more traditional engagement efforts is the integration of an overarching social marketing and communications campaign—such as paid media and advertising—that helps amplify and augment the on-the-ground strategies underway. The

Trust developed and implemented a paid media and mobilization component about one year into the overall grant period, though it was part of the original strategy. This was an intentional decision by The Trust to provide grantees both the opportunity to inform the paid media and mobilization effort and the chance to get their individual strategies up and running.

Key Learnings

DEVELOPING THE SHARED TOOLS: Developing a shared approach is fraught with difficulty. As anyone who has attempted to implement a voluntary collaborative strategy knows, the work that goes into developing buy-in for partners to implement something in common is extensive, particularly when it conflicts with their existing approaches.

Yet, in grantmaking situations, it is easy for funders to assume the barriers to engagement in a shared tool or approach will be easier because of the funding. In the case of PHC, this materialized in two ways: common messaging and the paid media campaign. The common message was intended to be incorporated into how grantees talked to their audiences, while the paid media campaign was a platform for grantees and The Trust to extend their reach and engage audiences in opportunities take action.

With the common message, The Trust initiated the development prior to the grantees being selected using focus groups and polls. The message was refined once grantees gave feedback and then grantees received monthly coaching, trainings and reinforcements at convenings to help them implement it. Yet, despite all this support, implementation of the message was inconsistent, with a sense from grantees of a lack of shared ownership, belief that it was too difficult and didn't resonate, or that it was too political. Implementation did improve over the course of the grant, but the challenges up front were much greater than expected.

A different approach was used to create the paid media and mobilization campaign, which was developed after all the grantees were selected; grantees provided input into the campaign's design during convenings and on a voluntary advisory committee. While most elements of the paid media campaign were static once implemented, where change was possible, it was adapted in response to ongoing feedback. Despite a different approach to creation, grantees did not feel ownership over this shared tool, either; the evaluation found little evidence of integration between the campaign and the grantees efforts, including almost no overlap in their audiences.

The Trust and its consulting partners had anticipated a more dynamic relationship between grantees and the paid media component, with a high degree of integration. This was reinforced in part by grantee feedback—that they viewed this kind of component as valuable and helpful to their own efforts. However, once the paid media campaign was launched, grantees perceived the paid media campaign as something The Trust was doing, and a separate component from their own work. The connection between those two components never fully materialized as planned.

The common message and the paid media campaign both were conceptualized by The Trust, then delivered to the grantees as a key component of the work. The common message was developed without grantee input but later revised with grantee feedback. The paid media campaign was developed with grantee input and revised after more grantee feedback. In both cases, grantees did not feel ownership over either tool. This highlights the importance of first having buy-in for the need for such tools before creating them—even when funding is included as an incentive, buy-in is critical.

HOW THE MESSAGE WAS VALUED AND UTILIZED: Thorough analysis of grantee feedback cross-analyzed with their message use over time indicates that there was important variation across the grantee cohort in three areas: (1) the perception of the value of the common message framework, (2) the adherence to message statements in grantee materials, both written and spoken, and (3) the evidence of message use among their audiences in the messenger and forums case studies.

Grantees fell into three tiers of message use. The first tier was primarily the most sophisticated advocacy organizations with past experience using externally developed messages to influence specific audiences. They used the message in many different ways, integrating into their content verbally, in social media, on websites and in other materials. The second tier saw value in the message, but struggled with implementation of it, misunderstanding the intent of the message, failing to integrate it into the rest of the content in their materials or frequently leaving it out altogether. The final tier rejected the message and made few, if any, attempts to fully integrate it—in two cases because they saw little value, and in one case because while they saw value for other grantees, they did not feel it was relevant to their audience.

This variability, both in use and the quality of message use, highlights the consequences of the inconsistent level of grantee buy-in and the challenge of asking a cohort of grantees to implement a shared tool. Readiness levels differed, with the first tier of grantees likely to possess past experience using messages. For these grantees, integrating messages into the content instead of putting them in pull-out boxes on the side of their website was obvious. For other grantees, it was more difficult to embed the common message into their materials and content. Their audiences differed, and despite multiple efforts to adapt the message, grantees with Spanish-speaking audiences never saw it as appropriate for their audiences.

Yet, even among those who had a harder time with message use, some still saw it as helpful due to having "go-to" language and appreciation for the training and assistance provided. Among those who did buy into the message, they also talked about how the message framework infused greater credibility, cohesion and consistency in the communications efforts of some grantees, and provided a mechanism to reinforce what audiences were exposed to on access-to-health issues—a key element of the public will-building concept.

HOW GRANTEE CONVENINGS WERE VALUED: In contrast to the challenges of engaging grantees in the common message and the campaign, grantee feedback about the twice-yearly in-person convenings combined with twice-yearly webinar convenings was positive overall, particularly for the in-person convenings. Similar to the previous two tools, the grantees had opportunities to inform the content, including engaging in pre-planning around specific sessions and sharing ideas for content that would be helpful. Shifts in response to grantee feedback included everything from shifting the use of webinars (which were largely not seen as positive) to expanding the time and space for peer-learning.

Distinct from the other two tools, grantee convenings did not require grantees to change how they did their work, but rather to step out of the day-to-day work to engage in shared learning and networking. It may be that while the convenings were similarly required by the funder, the lack of impact on the daily work of grantees made them feel less like an imposition.

CONTENT OF CONVENINGS: Grantees provided feedback on which convening topics were most helpful. They placed consistently high value on message training, a skill-building area associated with a mandatory part of their strategy. They also increasingly valued the small group breakouts, time spent working together as the strategy progressed and peer-to-peer learning. Sharing evaluation results and discussing key learnings were seen as helpful in strengthening grantees' individual work and highlighting the impact being made by their efforts. Grantee networking time became one of the most helpful parts of the convening. This finding was reinforced by evidence that the grantee network was active and resulted in shared information, supporting efforts and joint implementation of strategies between grantee organizations.

Overall, the convenings played a critical role in the strategy for most grantees, as well as for The Trust and its consulting partners. The time and space committed to convenings enabled better learning opportunities, more helpful information sharing and stronger partnerships to be formed.

STRATEGY #3 SUPPORTING LEARNING AND ADAPTATION

Many field-building, collective impact and public will-building strategies are inherently complex and adaptive. There are many stakeholders with different perspectives involved in the work; the external environment has a significant impact and changes frequently; there are many different types of feedback loops going in many directions; and often, some or many elements of the strategy itself are new to most or all of the partners involved. This is exactly the type of environment where purposeful learning and adaptation can be critical for success.[7,8]

The Trust's Approach

Project Health Colorado was not a static strategy. Rather, it was adapted steadily, with multiple revisions to major decisions, new decisions made during the grant period and significant changes in activities and resource allocation. This level of adaptability began early in the development of the strategy and was supported in part by an intentional strategic learning process. The evaluation found that The Trust made a decision to be adaptive and steadily reinforced that decision with grantees such that adaptations happened in abundance, both within grantee efforts and in the overall strategy.

The embedded, real-time strategic learning component was implemented within Project Health Colorado as part of the developmental evaluation process. The strategic learning component included theory of change development with The Trust, grantee orientation around a shared set of outcomes, significant use of learning coaches with grantees, optional strategic learning debriefs, various processes for systemic data collection, collective interpretation of findings and strategy adaptations and improvements. This approach became a grant management strategy for the foundation along with a real-time learning strategy due to the influence it had on how The Trust and grantees implemented their activities.

The Trust also had specific mechanisms in place to support adaptation. For example, The Trust's approach to funding non-grantmaking activities was to have a single budget to allocate as needed for a variety of technical assistance and support needs for the strategy, including strategic learning, communications support, training needs,

convenings and other types of support. This enabled modifications and some mid-course corrections to be made based on data collection, grantee feedback and observational learning by Trust staff and consultants. The Trust also had grantees submit learning reports instead of progress reports, where they documented their strategies, how they had learned about their effectiveness, what they learned and how they adapted.

Key Learnings

THE VALUE OF REMAINING ADAPTIVE: The value of an adaptive approach was reflected in feedback from both grantees and Trust staff, and was evident in grantee strategies, the paid media and mobilization component and the overall strategy. Grantee staff repeatedly reported they valued the ability to adapt and the evaluation identified dozens of specific examples of systematic, data-driven learning leading to improved strategies, many surfaced through the grantees twice-yearly learning reports. For example, grantees used strategic learning to improve participant recruitment, common message use, online and in-person training materials, levels of support provided to messengers, social media strategies and more.

Permission to adapt freed the grantees up to be creative, experiment with new ideas and make changes without feeling guilty that they were doing something wrong. Specific changes to the paid media and mobilization campaign also showed improved outcomes.

Overall, there is no question that adaptation worked for this strategy. There were many examples of improved outcomes and a widespread sense that permission existed to steadily improve and be honest about what was not working.

KNOWING HOW AND WHEN TO ADAPT: The primary challenge with the adaptive approach was solidifying how and when to make changes based on data or other feedback. While grantees made many changes in response to systemic, data-driven learning, there were also specific examples of grantees making changes for the sake of making changes, not because it was necessitated by data or evidence.

For example, some grantees changed strategies due to the lack of confidence in their ability to implement them well, rather than evidence the strategy was not achieving the desired outcomes. This highlights the importance of not adapting too early in a process, but rather waiting until it is underway and evidence about its impact can be collected. Other grantees misinterpreted what their data were telling them, adapting strategies in ways that were not able to improve their outcomes.

This experience highlights the risks of an adaptive approach and the difficulty of setting clear boundaries on when adaptation is appropriate. While The Trust did not resolve this issue, it did help to surface when these less-ideal adaptations were occurring through the combination of learning coaches and learning reports.

BEING ADAPTIVE MUST BE INTENTIONAL: Including an adaptive approach provided necessary flexibility for grantees and The Trust to modify and improve strategies and tactics. But, it was also difficult to initiate across the many organizations involved, took effort to maintain, and was not always effective. From this, The Trust generated critical lessons learned:

- Buy-in for being adaptive is needed at a grantee leadership level as well as by staff on the ground; one or the other alone is not sufficient.
- Funders can provide clear, explicit permission to adapt based on data or learning, along with adequate support to ensure purposeful adaptations (e.g., the strategic learning approach).
- Allow for patience, dialogue and plenty of room for corrections.

- Establish guiding principles for what can be adapted, as well as how and when to make appropriate changes.

HOW STRATEGIC LEARNING WAS VALUED AND PERCEIVED BY GRANTEE PARTNERS: Adaptation was heavily supported through a real-time strategic learning approach. On the positive side, evaluation findings suggest that most grantee staff, as well as Trust staff, found the strategic learning approach to be valuable and helpful to implementing their work. This approach helped grantees shift from a traditional reporting mentality to more of a learning mentality, where they had the ability to learn from successes and failures—and make subsequent changes to strategy and tactics—without fear of repercussions with the funder.

Grantees reported that the theory of change process and implementation was helpful in analyzing and assessing their strategies. The strategic learning approach also enabled grantees and The Trust to have adequate time for reflection, and bring some level of intentionality to deciding how and when to adapt strategies and tactics. Some grantees also reported that they plan to continue incorporating elements of strategic learning in their work going forward, as they both saw the value in it and have the capacity and understanding to maintain its use.

However, despite its reported value, several challenges were identified by grantee staff, particularly revolving around the time and resources that a strategic learning approach required. Carving out time for strategic learning and reflection was consistently cited as a major challenge, which also contributed to a sense of what was referred to as "learning fatigue." Learning fatigue was likely exacerbated by the expectations for a strategic learning approach not being adequately conveyed by the foundation at the front end of the grant period.

This combination of a high value placed on the processes and benefits of strategic learning, but a significant concern arising from the investment of time, suggests that funding strategies that intend to have data-informed adaptation may want to plan explicit time and resources across partners for this process.

RECOMMENDATIONS

When designing and deploying a complex funding strategy with shared intent, understanding the many variables and moving parts is critical. Context matters, of course, and there is not necessarily one "right" way to go about design and implementation. However, the learning drawn from the PHC evaluation can help to advance thinking about these kinds of strategies, avoid repeating previous missteps or pitfalls and improve upon past efforts in a way that adds value. Recommendations for funders include:

Maintain long-term commitments for long-term strategies.

Many funding strategies with a shared intent are trying to move the needle on a significant, long-term issue and long-term strategies necessitate a long-term investment.

The Trust decided to change its overall focus during the latter part of PHC. Following an environmental scan in 2012 and an ensuing strategic planning process, The Trust leadership announced a new vision in late 2013, after the PHC grant period ended, focused on "all Coloradans having fair and equal opportunities to lead healthy, productive lives, regardless of race, ethnicity, income or where they live." This led to the public will-building strategy not being continued after three years and also having less active management in its final year.

Several grantee staff recommended that funders doing this type of work understand that it is a long-term strategy and needs a long-term investment. The evaluation noted some issues with successful audience engagement by organizations that, lacking continued funding, had no way to take the next steps with those audiences. These learnings highlight the importance of considering the consequences of discontinuing a strategy mid-course and considering up-front whether a long-term commitment is likely to sustain.

Maintain diversity and depth of engagement in strategies, rather than narrow to a few key tactics.

The evaluation recommended that future funding strategies should consider not just the diversity of grantee strategies that will be funded, but also the likelihood that audiences of one strategy can engage in the activities of another. In the case of PHC, the geographic overlap of grantee strategies allowed for intensive engagement that built audiences' conviction. However, had the same strategies been dispersed statewide, the overlapping engagement seen in this evaluation would not have been possible, as most of the overlapping activities were in-person engagements.

Assess the added value of the common tools and develop a narrower (but more strategic) deployment if tools are used.

The Trust learned that shared messaging and shared campaigns are not "silver-bullet" solutions, nor are they applicable for any and all strategies. If such a component is pursued, the approach to creating it (or even envisioning it) may need to be changed. For PHC, it is difficult to suggest that the common message framework was either highly successful and should be continued or problematic and should be discontinued. Instead, the evaluation recommended careful consideration of the value of a common message framework, where it has the greatest value in the strategy

and the specific participants who should be the targets for encouraging message use. One could make the same recommendation for any other shared tool—careful consideration of who benefits from it the most, why and how.

Continue to create supportive infrastructure for grantee cohorts, but more actively manage them as multiple parts of an overall approach. The PHC evaluation suggests that future strategy development efforts and a more cohesive approach to developing the infrastructure could foster stronger alignment and integration between individual grantee strategies and funder-initiated campaigns. Ideas that might help with this include more intentional campaign huddles, engaging the different partners in joint learning debriefs, creating shared coaching plans for each grantee, promoting participation by different coaches on each other's coaching calls, doing joint coaching and doing more joint planning for major events. Some level of cross-training for consultants may also be useful, to allow them to better align in their advice where grantee needs overlap their areas of expertise.

Communicate expectations clearly through two-way communications. Include the expectation to learn and adapt alongside the funder. Finally, the PHC evaluation also encouraged future strategies to consider communicating with grantees not just about the planned activities, but about the expectation for grantee staff to be available in the less-planned potential activities as well. As foundations undertake more innovative work, future strategies may include emerging expectations that diverge from (or more fully clarify) the original plan. Working with grantee organizations that not only understand this potential, but have an organizational culture that can adapt, may greatly decrease the sense of an unexpected burden.

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