

Change Communications and Engagement Guide





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Dear Reader,

As a leader in Toastmasters, one aspect of the role is to oversee potential changes for the coming year, and beyond. Whether you are a member of the Board or leading a club, there will be change. We have some ideas for your consideration. If adopted, they could do the following for you:

1. Help establish a culture that embraces change with enthusiasm.
2. Ensure change efforts are successfully adopted.
3. Give you a framework for engaging others and communicating the change to get you the results you want.

How?

1. When you identify where you are in the change cycle, you can more effectively rally people to provide the information and resources that will help advance your vision and mission.
2. When you identify and use the communication methods, you more effectively communicate, and know people are responding to the information you provided with the actions you were hoping for.

What will help you with this?

1. Identify where you are in a change cycle. Once you do that, you can:
 - a. Identify who can help define the change to get you where you want to be.
 - b. Include the technical experts who know enough about the change to design it.
 - c. Identify the details you will need to implement the design. This includes the training, changes in processes, policies, practices, materials, and other resources.
 - d. Sustain the change by ensuring you have woven it into your systems, processes, practices, trainings, and communications.
2. At every stage, you will want to ensure you have addressed any confidentiality requirements for the effort and ensure that the appropriate level of sponsorship is on board.

Refer to additional questions beginning on page 3 to successfully and effectively communicate and engage others in your change at every stage.

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Engaging and Communicating During the Stages of Change

Stage of Change	Engage	Communicate
<p>Explore</p> <p>This is an early stage of change, where trends begin to indicate a need or opportunity, but not specifics about what is needed to move in the desired direction. This stage typically takes place at the strategic level.</p>	<ul style="list-style-type: none"> ▶ Recognition that authority and positional power could benefit from collaboration or partnership with others to strategize about the change. ▶ What expertise is needed? Who might be more interested in maintaining status quo? How could including a representative be beneficial? 	<ul style="list-style-type: none"> ▶ Beginnings of an "origin" story for the change, including whose voices were heard from the start. ▶ Identify stakeholders most impacted by the change and determine what, when, and how they will hear about the change. ▶ Establish two-way change communications and consistently update them.
<p>Affirm</p> <p>At this stage, decisions that a change is needed are made, and a broad idea of a future state is defined. Data and discussions at this stage take place to affirm the direction of the change needed to create the future state</p>	<ul style="list-style-type: none"> ▶ Determine whose agreement or cooperation is needed to move forward and methods for effectively engaging them. ▶ What concerns are stakeholders likely to have and how you will know and address them? 	<ul style="list-style-type: none"> ▶ Communicate strategically: Why change and why now? What is the desired future state? ▶ Communicate concerns, progress, and how the change supports the desired future state.
<p>Design</p> <p>Develop alternatives and test them through pilot projects or feasibility studies. Does the design achieve the desired future state?</p>	<ul style="list-style-type: none"> ▶ Determine who has knowledge and experience to participate in designing and determine what degree of autonomy they will have. ▶ How will you use stakeholders to pilot and provide feedback? 	<ul style="list-style-type: none"> ▶ Use communication to build trust in the process and those who are working on the design. ▶ Celebrate progress and effort and keep two-way communication in place.
<p>Implement</p> <p>Ensure the design is executed with the support needed to succeed. Detailed plans are developed and followed through for testing, feedback, and adjustments.</p>	<ul style="list-style-type: none"> ▶ Determine who is most likely to be most impacted by the change and how will you involve them in committing to change success. ▶ Who will you recognize for their contribution and how? 	<ul style="list-style-type: none"> ▶ Communicate what does and does not change for reassurance to those fearful of the change. ▶ Use influencers as communication channels to help keep two-way communication flowing.
<p>Sustain</p> <p>Ensure the change is fully embedded in the policies, practices, and structures to keep it in place. Collect feedback to make sure the envisioned future state is taking place and adjustments are made.</p>	<ul style="list-style-type: none"> ▶ Determine how you will gather the feedback on how the "new normal" is working and any needed adjustments. ▶ Who will participate in maintaining status quo and how? 	<ul style="list-style-type: none"> ▶ Celebrate and recognize champions of the change—those who are modeling behaviors of the desired future state. ▶ Communicate feedback and updates to ensure the new status quo is well known.

Key Questions for Communication and Engagement

Why change and why now?

It is important to explore why the change is occurring both from the perspective of the change deliverer and the change receiver. Effective communication about any change begins with why and why now? When working out why you are affecting change, consider these questions:

1. Why is it important that we make this change now?
2. How does this change relate to our strategic plan and our values?
3. What will it look like once the change has taken place?
4. What is the risk if we do not make this change now?
5. How do we know this is a good idea? What data or sources show this?
6. What is the key message you want people to hear about this change?

What is changing and what is not?

It is important to be very clear about what is changing and what is staying the same. Describe the change: What specifically is changing and what the new state will be once the change is in place. When working out what is and what is not changing, consider these questions:

1. What is the current state?
2. What is the future state?
3. What is included in this change?
4. What is excluded in this change?
5. What will be the impact on stakeholders? What will we ask them to do differently or change?

Who cares about this change?

Impact analysis will help us understand the impact on different audiences, as well as the influence they will have on the success of the change. It is important to identify priority audiences to ensure that you connect with them appropriately. When working out audiences, consider these questions:

- ▶ Who is affected positively or negatively by the change?
- ▶ Who will gain from it and who will lose from it across a range of gains such as material, financial, status, power, influence, and the like?
- ▶ Who might want it to succeed and who might want it to fail?
- ▶ Who has the power to cause the project to succeed or to fail?
- ▶ Who controls or provides the resources and facilities that will be needed?
- ▶ Who has the special skills needed to make it succeed?
- ▶ Who are the positive and negative opinion leaders?
- ▶ Who exercises influence over other stakeholders?

- ▶ Who are the less obvious stakeholders you have not considered yet?
- ▶ Which groups are likely to be your greatest advocates if you engage well with them?

Here we can list the stakeholders impacted by the change and specifically those who are most impacted. The list can include:

- ▶ General audiences or specific audiences, depending on the impact
- ▶ Suppliers or contractors
- ▶ End users, including those who may have opted out of communications

What specifically do stakeholders need to know about the change?

- ▶ Anticipate the impact of the change on the stakeholder and describe the potential features, benefits, value, opportunities, and losses that may occur as a result of the change.
- ▶ Determine the support/actions needed for each stakeholder group during the change.
- ▶ Manage the communication expectations of the general or specific audience (e.g., decision, action, information only, request, feedback, etc.), how responses will be tracked and addressed, and any contingency plans to anticipate action in case of adverse or undesired responses.
- ▶ Categorize feedback or responses in terms of urgency and have a schedule to respond within a specific time period. (Preferably set an auto reply explaining how the email/communication will be treated once received.)
- ▶ Information about engagement—who has been engaged with, how, and why.

When planning the work, it is worth being clear about who is **responsible** for each activity or deliverable, who is **accountable** for it (this tends to be someone more senior who can provide sponsorship and direction), who should be **consulted**, and who should be **informed**.

What questions will people have about the change?

If appropriate, establish a channel for frequently asked questions, how to submit questions and concerns, a timeline for responses, and who is responsible for ensuring the questions are answered and the communication loop is closed.

When is the change taking place?

Consider the timelines of the change, when each audience would need to be kept informed, and the key messages they would need to hear.

Provide a timeline and schedule for when each message should be communicated (including reminders if it is a call for action). Put a milestone-based timeline for reviewing the communication plan to track the status of whether the project is running on time. Keep severity parameters on making changes to the communication plan if the project execution is leading or lagging in final change implementation timelines.

Develop a process for follow up to ensure the communications have taken place as necessary, in line with the plan, and adapt where necessary.

How will the stakeholders hear about the change?

A key activity is to determine the effective modes of communication for each stakeholder:

- ▶ The communication channel(s)—email, magazine, social media, press release, website, webinars, chat messenger posts, doodles, presentations, education sessions, etc.
- ▶ The communicator(s): in person, one on one, by group, District leaders, club leaders, Chief Executive Officer, International President, Board of Directors, World Headquarters, etc.
- ▶ Different channels may need to be used for different Districts. Be culturally aware. For example, WeChat is a better channel than Facebook for those in China.

Did the communication work?

Keep the end in mind when developing the communication. Close the communication cycle to ensure that the communication is having the desired results. Include a timeline for reviewing results. Define whether the communication is informational or a call for action to measure the effectiveness of the communication. Establish criteria, metrics, and timeline to monitor results.

Responsibilities and Sponsorship

Establish who is responsible for managing the communication plan and who provides sponsorship and gives permission to communicate.

It may be that there is an overall lead for communication who manages the plan and others are involved in delivering different aspects of the plan. To manage that, within the plan itself there is the opportunity for each element to determine staff function/position responsible for ensuring the guide is used, reviews take place, and updates are made based on feedback.

Sponsorship is a key role—it is about constantly attending to the strategic goals of the change and the interests of the organization as a whole, watching out for opportunities and risks across the piece, and providing guidance, support, and feedback to the change team. A key element is acting as an advocate for the change and when senior engagement is needed to enable the change or address blockers, they are there to support.



Engaging for Excellent Experiences

We need to have the appropriate engagement at the appropriate change stage for the appropriate member groups. Consider the questions in the image below:



These questions form part of an “empathy map”, which is a tool you can use to plan your engagement.

If you are at the beginning of the planning stages, you have the opportunity to build in engagement activities throughout delivery. We also need to be prepared to react as the change evolves, as risks and opportunities arise, and when it becomes clear how people are responding to the change. As you progress through, you will discover members’ responses to change and the issues that concern them, and the way resistance to change is playing out. Engagement is a vital tool for your adaptation to these inevitable factors.

At any stage of the change, it is important to reflect on where engagement would be helpful and necessary, and then build in the time for it. *Engagement can seem time consuming, but to use a decorating metaphor, so is preparing a wall before you put paint on it! Better to prepare the wall in advance so as to avoid undoing all your work and having to start again when things go wrong.*

A Continuum of Engagement

There are five different levels of engagement with members that relate to their influence and a desired level of involvement. These levels are likely to vary across a change’s lifetime and any change might involve multiple forms of engagement at different times.

Co-create	Partner	Involve	Consult	Inform
<p>With co-creation, more senior groups relinquish their relative power and let less senior groups lead in a shared collaboration process, most likely in the early exploring and affirming stages.</p>	<p>Like co-creation, this is also a collaborative process, where the participants have more of a peer relationship (even if there are power differentials). These could be internal partnerships or with external organizations, like Rotary.</p>	<p>Work directly with members or representative groups on one or more aspects of the change and at various stages.</p>	<p>Obtain feedback from representatives of member groups on proposed changes for use by decision makers.</p>	<p>To provide information or instructions about the change, particularly during implementation stages when other kinds of engagement have already happened. May request a call for action.</p>
<p><i>For example, a group of Board members might choose to work with a group of Club Growth Directors (CGD) on a corporate growth initiative, where it is the CGDs who take the lead on the collaborative work.</i></p>	<p><i>For example, changes to the Region Advisor (RA) role might be determined in partnership between the Board and the RA community.</i></p>	<p><i>For example, we might re-establish the Learning Master role for future improvements to Toastmasters Pathways learning experience, and ask them to gather information and insights from clubs and members. They would share this in design discussions.</i></p>	<p><i>For example, we might consult with CGDs and District Directors on a change to how we manage leads for new clubs.</i></p>	<p><i>For example, if we were launching a change to membership forms to address a regulatory tax requirement, we might inform club officers and raise a call to action for them to use the new forms.</i></p>

Engaging at Each Stage of Change

Different stages of a change effort are likely to require different types of engagement. We have identified five stages of change for engaging members and questions to consider at each stage.

Stage	Questions to consider
Explore	<ul style="list-style-type: none"> ▶ Who can help us work out what is needed, what the practical and strategic implications and opportunities are, and what will work? ▶ Are there people whose expertise or experience will help us shape the solution? ▶ If we played around with the power dynamics so that the less senior peoples' voices were amplified, what might we discover? ▶ What is the story you will want to share in the future about the origins of this change and how voices were heard from the start?
Affirm	<ul style="list-style-type: none"> ▶ Whose agreement do we need to move forward on this? Whose agreement would be helpful? ▶ What are the likely matters they will have questions or concerns about? ▶ What are the things that will still be open to change after the decision is made that can still be influenced afterwards?
Design	<ul style="list-style-type: none"> ▶ Who has knowledge and experience of how this works or could work across various contexts and types of members? ▶ How can we understand the experience of ordinary members (i.e., unlike international and District leaders, members will not be well connected across the organization and know where and how to find things out easily)? ▶ How can we test and pilot these changes with ordinary members before it is implemented across the organization? ▶ What is the story you will want to share in the future about how the change was designed and whose voices were heard?
Implement	<ul style="list-style-type: none"> ▶ Who is most likely to be at the front line of the change? Who can see how it is going and provide feedback on issues to be addressed? ▶ Where are the places (physical and online) where progress and challenges will be discussed? How can you get in the middle of that to listen, act on issues, celebrate successes, and be seen to be on the case? ▶ What spaces and resources will you create to enable people to get help and answers to questions? ▶ What do you hope members will say about this change? How can you be better informed about what they are saying? ▶ What is the story you will want to share about how you engaged with members during implementation? ▶ Who will you recognize for their contribution and how will you celebrate them?
Sustain	<ul style="list-style-type: none"> ▶ How will you continue to engage once you are past implementation and in the new "business as usual", so that you can see what is working, what is not working, how well adoption is growing, or if it is waning? ▶ Are there opportunities to provide improvements that reflect what you are learning from feedback and shows you are learning from it?

Stage	Questions to consider
All	<ul style="list-style-type: none"> ▶ From a change schedule perspective, when is the best time to engage and with whom? ▶ How long should we give for the engagement to happen? ▶ Are there events, forums, or groups already in place that we could use? How can you make use of Toastmasters events and communities to involve, hear voices, and gather feedback? Consider examples like; <ul style="list-style-type: none"> ▪ Board, Region Advisors, international committee events ▪ Board or Region Advisor visits to Districts ▪ Convention (town halls, etc.) ▪ District leader training ▪ District conferences, Club Officer Training ▪ Area and Division Councils, Area Director visits ▶ How will you maintain participation through the lifecycle of the change, including managing changes in participants, with actions and timelines for induction and debrief? ▶ How will you initiate engagement with participants, set expectations on what is desired from them, and get agreement on participation? ▶ What are people likely to be saying about the change—both face to face and on social media—that we could be proactively engaging with? What are they saying now? ▶ Who can you enlist to help with engagement (e.g., Board of Directors, Region Advisors, external partners, District leaders, club officers)? ▶ How will you assess and adapt to the input and feedback you receive and show that has been done? How will you measure and show the impact of engagement? ▶ How can we use our engagement work and recognition of participants to show that we have engaged effectively and continue to be committed to engagement? ▶ How can we show gratitude and recognition for contributions?

On the Question of Confidentiality...

Change programs naturally have requirements around confidentiality—release of information at appropriate times, and being seen to be as transparent as possible, especially in a membership organization like Toastmasters are important.

- ▶ Clarify the specific requirements for confidentiality and how that will evolve as you go through different phases of the change.
- ▶ Clarify the impact of any breach of confidentiality and the period when confidentiality will be required. Assess and address risks that information may be shared despite confidentiality agreements.
- ▶ Determine how you will be gaining commitment from participants that they will maintain confidentiality. Provide clarity on when it is no longer necessary to keep things confidential, and especially when it might be desirable for people to speak about their engagement.



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