

# **Creating Alignment during Organizational Change: A Case Study of the American Cancer Society's Cause-Branding Platform Design**

Katherine Joanne Pike

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**Approved by:**

Peggy Leatt, PhD (Chair)

Bryan Weiner, PhD

John Paul, PhD

Scott Bennett, American Cancer Society

Guy Fischer, American Cancer Society

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## **ABSTRACT**

KATHERINE JOANNE PIKE: Creating alignment during organizational change:  
A case study of the American Cancer Society's cause branding platform design  
(Under direction of Peggy Leatt, PhD)

Cause-branding related marketing alliances have exploded in the past decade. Cause-related partnerships represent a > \$1billion industry benefiting a broad range of stakeholders (non-profits, corporations, etc.) ACS leadership approved the creation a new vision for ACS corporate cause-branding partnerships as a new organizational strategic direction. Due to the governance structure, interpretation of the executive limitations, prior past experience, low cause-brand equity, and proposed prevention-based focus, the Society embarked on a strategic change management process to address strategy and implementation of this new initiative.

The purpose of this dissertation is to utilize a case study format to explore the ability and ramifications of creating alignment during the change management process surrounding key decisions, governance and policy changes and implementation tactics with executive leadership, senior leadership, and implementation staff. The case study includes a situation analysis of the American Cancer Society, provides background on why the organization wants to move in this new marketing direction; current background on cause-branding as an industry and ACS market share; the governance structure and organizational change management practices of ACS. A literature review

on creating alignment during change management is utilized to establish necessary components of alignment theory. Using information gathered from interviews and a document review were utilized to further understand the ability of the organization to meet two crucial points of alignment, vision and work processes.

The case study was able to identify key decision points for the change management strategy, distinct areas of agreement on vision and work processes for policy changes, as well as areas that did not share a common understanding on vision or work processes. In addition, interviews were able to identify core strengths of the change strategy that are applicable to building capacity for future change in the organization. Four recommendations for improving the current cause branding change strategy are made to solidify alignment across all decision points. Based on this case study, five recommendations with a roadmap are made to encourage alignment across future change initiatives in the organization.

To Bradley Wade O’Kelley, Holdan Pike O’Kelley, and Addison Pike O’Kelley

Beidh grá agam duit go deo.

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## **List of Abbreviations**

ACS	American Cancer Society
AHA	American Heart Association
ASCC	American Society for the Control of Cancer
CB	Cause Branding
CBA	Cause Branding Alliances
CBRT	Cause Branding Review Team
CEO	Chief Executive Officer
CPG	Consumer Packaged Goods
Div	Division
DT	Design Team
EBS	Evidence-based Science
EI	Employer Initiative
IARC	International Agency for Research on Cancer
IFP	Integrated Fundraising Plan
NET	Nationwide Executive Team
NHO	National Home Office
NVP	National Vice President
OI	Organizational Integration
PAF	Preliminary Approval Form
PR	Public Relations
SC	Steering Committee

TBD	To Be Decided
UBIT	Unrelated Business Income Tax
VP	Vice President

## **Chapter 1: Background**

### **Introduction**

The American Cancer Society (the Society; ACS) has a long history of constituent engagement, funding research, and health promotion programs. With over one million volunteers, the Society has a presence in over 4,500 communities and an active donor base, reaching \$1 billion in total donations annually. Historically, cause-branding did not represent a strategic priority. However, the strategy had been recognized for its three-fold potential effect on the Society. The three main reasons for ACS to weather an organizational strategy change were building revenue, dissemination of health-related messaging, and increased constituent-relevance and engagement.

### **Situation Analysis: American Cancer Society**

The American Cancer Society is largely a science-driven, non-profit organization. The Society is most well known for its research related investments, second only to the United States government. ACS has funded over \$3 billion lifetime total and annually over \$130 million in research extramural grants. Science and research also are heavily represented within the board of directors and executive team, the majority being

physicians, medical personnel, or researchers from a university background. In the past, the leadership team for the Society had not been heavily composed of business-oriented marketers; ACS orientation had been to avoid brand-related partnerships. As a result, marketing had not played an important role except for prevention or early detection consumer awareness messaging. Also, a risk adverse interpretation of existing executive limitations limited relationships with corporate partners seeking to utilize the Society brand.

Revenue growth and continued exploration of new fundraising strategies are a requirement for non-profits to maintain and expand mission-related services. While income had peaked at \$1 billion annually prior to the recent recession (2007 & 2008), the organizational growth strategy is to reach \$2 billion by 2020. In 2003, the American Cancer Society went through a process to define strategic focus for fundraising, emphasizing key constituent groups<sup>\*</sup>. During this time period of strategy definition, cause-marketing capacity was acknowledged as an opportunity for engagement through corporate outreach. However, internal limitations including lack of strategic focus, cause-brand strategy, and executive and organizational limitations placed on visible corporate partnerships resulted in limited growth capacity in this initiative.

Corporate-related fundraising, including philanthropic and employee-directed donations, comprise over 30% of total annual revenue for ACS. However, marketing-

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<sup>\*</sup> The strategy is referred to as the Integrated Fundraising Plan (IFP) and continues to be the defining income growth strategy and projections for ACS.



related corporate donations accounted for a small proportion of the total. Cone Inc., an agency within the Omnicom family focused on strategy and communications to build brand trust, completed a survey on American's perceptions of corporate engagement with nonprofits or for social issues. Results of the survey pointed to American's being more willing to tell a friend about a charity and more willing to donate upon learning about a charity's corporate partnerships, 42% and 36% respectively<sup>†</sup>.

Similar to the process for identifying the Integrated Fundraising Plan, in 2003 – 04, ACS identified and ratified four leadership roles for the mission-based activities of the organization. These four leadership roles are 1) support better decisions with a focus on information for newly diagnosed and caregivers, 2) leverage ACS' scientific credibility to support innovative, high impact research, 3) improve cancer patients' quality of life, and 4) increase prevention and early detection of cancer with a focus on lung, colorectal, and breast. All leadership roles are flanked by the pillars of working through advocacy and focusing on disparities. Each leadership role is supported by focus areas with supporting tactics.

Noticeably missing from the leadership roles are areas of consumer-driven behavior relevant to nutrition and physical activity or prevention through individual lifestyle. It is widely recognized that inadequate consumption of fruits and vegetables

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<sup>†</sup> Downloaded from Cone, Inc. on June 1, 2009:  
<http://www.coneinc.com/research/>

and physical inactivity is associated with being overweight or obese; it is also associated with various chronic diseases including several forms of cancer.<sup>1</sup> Since the roll-out of the ACS leadership roles, there has been a recent movement to include more prevention based activities. It is estimated that changing lifestyle related behaviors could impact the occurrence of two-thirds of cancer cases. Important to increasing healthy lifestyle choices, are environmental factors and marketing practices maintained by the food, beverage, and exercise industry.

Recent market research has contributed to an internal movement to increase visibility with the American public. Every two years, ACS conducts external market research to monitor opinion, awareness, and perception about ACS while also identifying trends with other nonprofits and health charities. The “Image Study” was conducted by Harris Interactive from October 2007 – January 2008 and interviewed 1,000 adults across the United States. Some of the results from the study showed important changes in public opinion towards ACS. The Society continued to be the most trusted source of cancer information; people reported knowing less about the Society then two years ago; ACS had the highest top-of-mind recall out of any health charity; Komen for the Cure was credited with being more visible in the community and Lance Armstrong Foundation was seen as more innovative. While some indicators remained positive, indications of low visibility, less knowledge about the organization, and lack of innovation created a desire to commit to building organizational relevance with the American public.

In recent history, there are other nonprofits that have identified a need to create more relevance with their core constituency. In 2005, the March of Dimes, a non-profit centered around prevention of birth defects and premature births, commissioned a study on donor retention and potential brand strategies for the organization.<sup>2</sup> The study results showed a significant correlation between perceived importance of the health-related issue and donor retention. Current donors, lapsed donors, and nondonors to the March of Dimes all rated cancer as one of the most important health-related issues to them personally. Thus, exhibiting committed constituents of one non-profit still show affinity and support to cancer issues. In January 2008, March of Dimes launched a new brand to engage consumers in all aspects of the organization putting new focus on overall pregnancy and babies – March for Babies is the new umbrella brand for consumer engagement.

### Cause-Branding Background

Brand is a basic tenant of marketing design across all organizations, regardless of type of industry or profit-status. The American Marketing Association defines brand as the use of name, symbol, sign, design, or combination of these to connote the services or product of one producers and a way to differentiate those from another provider. As organizations build a brand or consider adding sub-brands, consideration to what the brand will deliver, mean, or define for the organization needs to be considered.

Kotler<sup>3</sup> defined six levels of meaning for brands; brands can be grouped by their ability to utilize each or many of the levels to differentiate or define a product or an organization. The six levels of meaning include: attributes – that a brand can bring to mind characteristics of a product; benefits – that the brand can translate into practical or emotional benefits to the individual; culture – that a brand can represent a set of principals, beliefs or culture about the product or organization; personality – the brand displays personality traits consistent with human-like traits; and user – the brand projects the type of user that would want to engage with the product or organization. According to Kotler, the more effective brands will attempt to engage individuals across multiple levels, which creates a deeper and more personal experience for the individual participating with the brand.

For a non-profit, brand needs to invoke an emotional remembrance of the cause.<sup>4</sup> This brand should be defined by the organization's principals and mission statement, while conveying the emotional connection to the overarching need. While the American Cancer Society had a strong, visual master brand, it lacked sub-branding specific to health messaging to attract specific target constituents. Sub-branding or cause-branding relates to specific business objectives that roll-up to the overall organization or master brand.

Cause-marketing began over twenty-five years ago with a corporate campaign to support restoration of the Statue of Liberty. 'Cause' partnerships were estimated to be worth \$1.57 billion in 2009.<sup>‡</sup> Cause partnerships and/or initiatives are defined as the opportunity built between corporations and nonprofits or environmental/social causes to mutually benefit the corporate bottom-line and the social position.<sup>5</sup> Cause-branding moves past the historically transactional based cause-marketing to position a branded platform for corporate and social causes for mutual long-term partnership. Cause-branding is viewed as an extension or integral part of a corporations' social responsibility platform.

Cause-branding within nonprofits has become a common place endeavor with large rewards. From 2002-04, the American Heart Association (AHA) began building a cause-platform to connect with women. During the launch of 'Go Red' in 2004, AHA was able to secure multi-million dollar sponsorships. Within two years, AHA was also able to demonstrate increased awareness of heart disease as the leading killer of women and increased healthy behavior for those who knew basic facts of heart disease.<sup>6</sup> Thus, AHA executed both a social awareness and income development platform. In addition to AHA's Go Red campaign, AHA also launched Start! in 2007. Based on revenue research, St. Jude's Thanks and Giving campaign receives \$32 million annually and Komen for the Cure receives \$72 million annually through cause-branding

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<sup>‡</sup> Downloaded from IEG, Inc. on May 24, 2009:  
<http://www.sponsorship.com/iegsr/2008/12/22/10386.asp>

partnerships. Comparatively, the Society raised ~\$10 million annually in corporate cause-branding relationships in 2008. Overall in 2008, the Society fundraising totals quadrupled and doubled Komen and St. Jude's fundraising, respectively.

The American Cancer Society's historical position in cause had been limited to sporadic cause-marketing partnerships without a defining over-riding strategy approved by all aspects of the organization. With ACS revenue reaching \$1 billion in 2008, the annual revenue from cause-relationships represented roughly 1% of total revenue. Previous cause-relationships had proven to raise public relations issues for ACS, which resulted in an organizational unwillingness to pursue cause partnerships. Also, intra-organizational disconnections on revenue share principles and overriding strategy resulted in dissatisfaction with sponsorship outcomes. While overall, the Chronicle for Philanthropy Data consistently ranked the Society as the #5 non-profit in America, it was one of the lowest performing non-profits in cause-related branding strategies and related performance objectives.

As a science-driven organization, the Society internally struggled with the evidence or lack of evidence on consumer products relationship to cancer versus the ability to accept corporate partnerships. The internal confliction was often driven by the knowledge that absence of evidence on a potential carcinogen or beneficial lifestyle agent did not mean the evidence was absent. Often times, the debate resulted in lack

of movement, consensus, or understanding what an appropriate partnership was. The end result usually ended up as no corporate partnership.

In order to create a successful brand platform, ACS knew there needed to be a match between 1) cancer control authenticity, 2) a target audience with a similar interest, and 3) corporate sponsors interested in marketing to the target audience. Building the key message to resonate and change awareness, while driving purchasing decisions, required extensive market research with both potential audiences and sponsors.

The launch of the American Cancer Society's new cause-branding platform provided an opportunity to not only revisit prior experiences, but also provided the chance to address strategic areas of focus previously not considered. Cone, the marketing agency that worked on the cause-brand platform development, conducted market research with women and corporate America and discovered a potential theme that resonated with both parties. The theme also provided ACS with an opportunity to focus on prevention, a younger target demographic, and women as the chief decision-maker on purchasing and health in a family. Women and prevention practices focused on the concept of personal sustainability – creating an understanding between the connection of taking care of your health (the target woman) and lowering your cancer risk – became the focus of the cause platform. Personal sustainability was of interest to

corporate America who primarily target women who care for themselves and their family.

Personal sustainability came to life as the 'Choose You' movement. Choose You was launched in May 2010 through multiple mediums including, retail engagement strategies, employer activation toolkits, local events, earned media outreach, sponsorship activation, and ACS programmatic activation. May offered the ability to capitalize on Women's Health Month and Mother's Day messaging. While May 2010 was the concentrated promotion time, Choose You promotion would be active throughout the year through corporate sponsorship channels and key drive times for health and wellness messaging in the media.

#### American Cancer Society Organizational Background

When the American Cancer Society was established in 1913, cancer was locked behind closed doors. A veil of secrecy about cancer confronted the 15 physicians that founded the organization; the original intent of the newly formed American Society for the Control of Cancer (ASCC) was to bring cancer into the mainstream of public discourse. The original educational goals surrounded publishing journal articles, publishing monthly bulletins on cancer information, and physician recruitment to assist in public outreach.<sup>7</sup> During the 1940's, ASCC reorganized to become the American Cancer Society (ACS); the first research program was started; and the first general



public, consumer awareness campaign was launched, Cancer Signals. During those formative years, ACS began a trend of funding future Nobel Prize winners early in their career and influencing cancer control advocacy work. ACS's historical accomplishments include funding \$3.3 billion in cancer research and 44 Nobel Prize winners early in their careers.

Today, the American Cancer Society has focused its mission on four key areas: education, advocacy, research, and service. Also, the organization has set three ambitious challenge goals supported by a focused body of work on 1) 25 percent reduction in age-adjusted cancer incidence rates by the year 2015; 2) 50 percent reduction in age-adjusted cancer mortality rates by the year 2015; and 3) Measurable improvement in the quality of life (physical, psychological, social, and spiritual) from the time of diagnosis and for the balance of life of all cancer survivors by the year 2015.

In order to achieve these lofty goals, the organization recognized that there needed to be an increased focus in the disease sites that were the most burdensome and the most preventable. Also, there was recognition that there needed to be an increased focus on audiences without access to care; there could be no preventive care or treatment application for those without health insurance. The organization set specific objectives on the areas of breast cancer, colorectal cancer, lung cancer, prostate cancer, nutrition and physical activity, skin cancer, youth, quality of life, and access to

care. All mission outreach based activities fall into strategies that support objectives in these focus areas.

Over the years, there have been multiple governance structures. Today the American Cancer Society is composed of 12 separately incorporated Divisions and the National Home Office. The National Home Office (NHO) coordinates with the Divisions to reach common strategic goals. The NHO has two distinct governing bodies, the National Assembly and the National Board of Directors, comprised of both volunteers from lay and medical backgrounds with representation from each Division. The Chief Executive Officer of the NHO is selected and reports to the National Board of Directors. The Board has established executive limitations for key policies the organization must adhere. The CEO provides periodic monitoring to the Board to confirm the organization's adherence to those limitations.<sup>7</sup>

Mission activity, income development, and coordination of services happen between the Society's 12 Divisions and the NHO through the work of inter-divisional executive leadership councils and additional activities. Each Division receives a charter from the national Society that is reviewed and revised every three years in a dual-responsibility process that ensures the coordination of mission, uniform high standards, and consistency. Division CEOs and key national staff officers meet regularly as the Nationwide Executive Team to make collective operational decisions and to coordinate the work of cross-Divisional groups that focus on developing and sharing best practices.<sup>7</sup>

## Chapter 2: Review of the Literature

Failure rates for organizational change management initiatives are often quoted at above 50%. With execution of change initiatives failing at significant numbers across all industry types, many organizational and change management theorists have attempted to explain the reasons for failure and steps to avoid common place errors. In 1996, John Kotter<sup>8</sup> from the Harvard Business School published an often cited book, *Leading Change*, to provide a basic assessment of reasons for failure and an eight-stage process for success. The eight-stage process addresses urgency, coalition building, vision, communication, employee empowerment, short-term wins, and anchoring the initiative within the culture. Kotter theorizes that missing any of these stages will result in failure long-term.

In 2008, the Society began an executive engagement process to define a new cause-related branding strategy. Cause-related branding represented a new direction and a significant change in marketing the Society with broad implications across existing internal business processes, external fundraising activities, local engagement strategy, and health promotion messaging. While environmental conditions and desire for the change necessitated the movement in strategy, there was a significant amount of literature about general change management theory to support the need of the

organization to address key areas of concern to ensure long-term execution and longevity.

The new cause-branding strategy for the Society represented an opportunity to monitor and measure effectiveness of ACS change management practices. In particular, the ability to monitor the creation of alignment between departments, individuals, and the leadership team about a singular vision and need, when historically there had been disagreement over the worth and objectives of cause-related partnerships. Because change management was too broad of a subject for this case study, the focus of this literature review will be on one sub-theory of change management, creating alignment. Articles that include change management and alignment around non-profits, executive stakeholders, leadership, and/or brand policies will be given high priority in the search. Specifically, the intent of the review will be to answer:

- What does the organization need to consider from change management theory and case studies to ensure alignment is created during strategy development and execution?

#### *Variables Affecting Success*

*Leadership commitment* – Nationwide executive team controls community mobilization and activation of consumer engagement and donor strategy. Satisfaction among the

nationwide executive team was integral to ensure the new branding strategy was implemented. Executive team perception of the change as a positive force for the organization was important to ensure long-term success.

*Change management* – The planned and unplanned process to insure business processes and executive opinion moved to positively affect brand position, fundraising, and mission objectives.

*Alignment* – The ability to have multiple stakeholders agreed on and aligned around vision, strategies, business practices, and resources on a common approach.

*Applicability to future change management within ACS or other non-profits* – Monitoring success, failure, or neutral movement was integral to future strategy or activation.

Many of the large, health related non-profits have the same type of national, local office, and board structure that the Society maintains. Thus, change management practices and leadership review processes for the Society are applicable to several other organizations.

### *Rationale for Relationship*

A new direction in cause-branding strategy required all major business units of the Society to have the same vision to ensure mission and fundraising objectives were met. Health-related non-profits provide an important role within public health, such as public education, fund-raising, advocacy, and research grants. An effective change management practice for a cause-branding strategy offered the opportunity to create a

common vision for all relevant public health delivery and support functions. As change occurred throughout the organization, it became important to align (common vision, work goals, and rewards) departments around decision making criteria, business practices, and internal policies to ensure a successful brand strategy.

## Methods

### *Sources*

Creating alignment during a change management process has applications throughout multiple areas of business and leadership. To ensure broad application to multiple industries, databases were utilized to ensure health care, business, communications/marketing and non-profit management were searched. The following databases were utilized during the search process:

- Business Source Premier
- Communications and Mass Media Complete
- PsychINFO
- Academic Search Premier
- PubMed

Manual searches were performed through individual journals focused on change management, including Journal of Change Management and Organizational Psychology. Once articles were identified as relevant to the topic of creating alignment during change management, manual searches of citations within the articles were reviewed and compared to the search results.

### *Key Word*

Key word searches were utilized to narrow in on thematic issues around creating alignment during change management and the role of leadership. Keywords included were:

<b>Leadership</b>	<b>AND</b>	<b>Change Management</b>	<b>AND</b>	<b>Alignment</b>
Leadership OR Executive OR Organizational OR Strategic		Change Management OR Organizational Change Management OR Dynamic Environment OR Change Framework		Alignment OR Strategic Framework

Due to the plethora of peer-reviewed literature on change management generally, literature was calculated and included on the basis of the inclusion of strategies to create alignment, involvement of leadership in the change process, and nonprofits or healthcare organizations. Literature was excluded if it was not relevant to executive team or leadership engagement to create alignment strategy or did not represent an organizational change. Non-profit status was the first-tier review criteria; however, non-profit based articles were not located easily so business and/or profit-based organizations were included in the review. Articles written more than 10 years ago were excluded from the research findings.

### Results

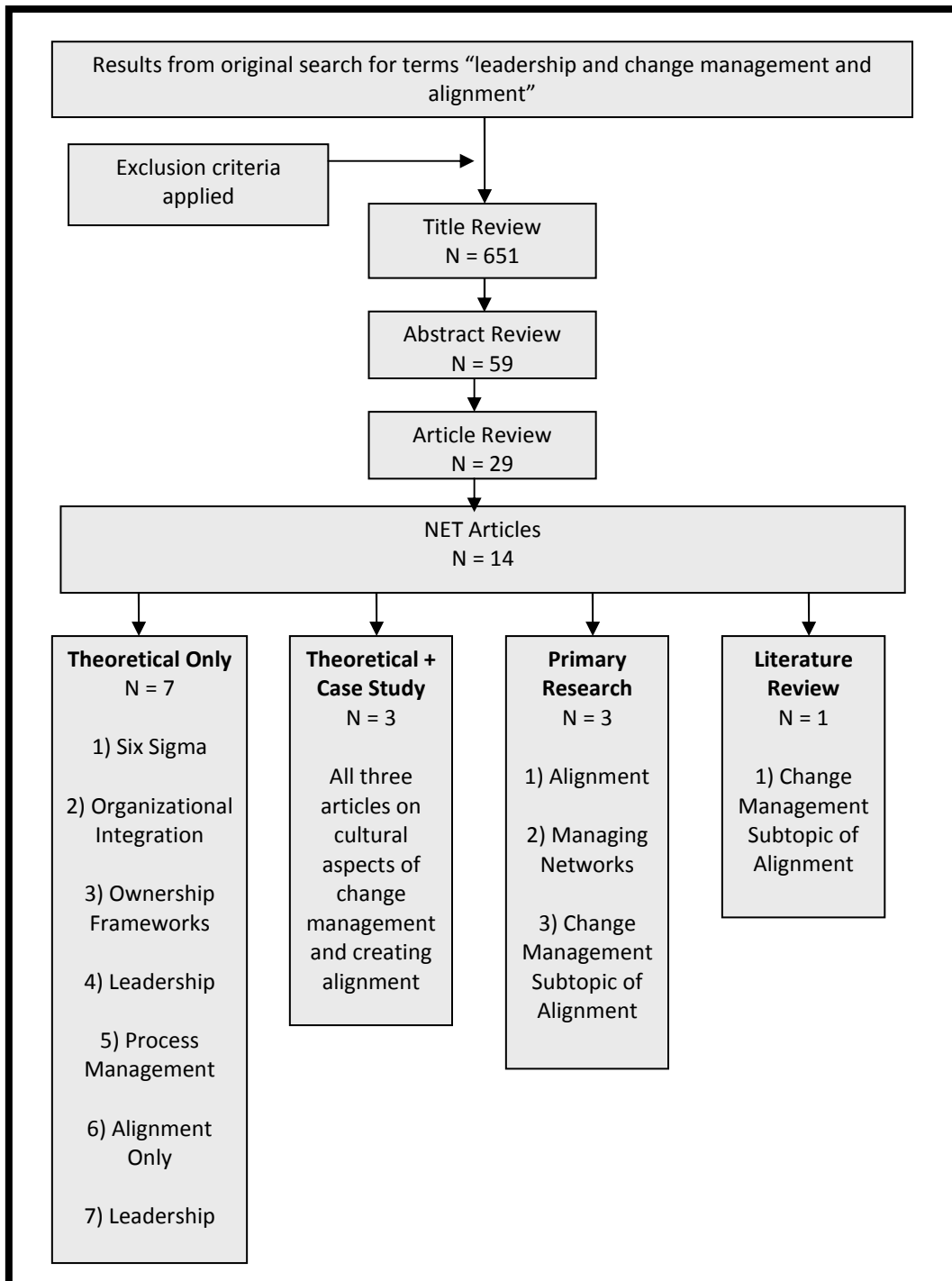
Search results yielded 1307 articles related to organizational change management (Business Source Premiere returned the highest amount with 1039 articles, PubMed returned 17, PsychINFO returned 0, Academic Search Premier returned 239 and Communications and Mass Media Complete returned 18). In order to cut down the returned articles, exclusion criteria of 1) time since publication, 2) only peer reviewed journals, and 3) English as the publication language were implemented and resulted in the total article pool of 651. Of the remaining articles, title review was completed to ensure the subject matter was appropriate for inclusion in the literature review. Several articles were excluded due to irrelevant subject matter, such as change management utilized for a technology change; quality management processes in a health-related organization; or a title that lacked a description related to creating alignment or leadership-level engagement in the organizational change.

After application of the inclusion and exclusion criteria and first-level title review, 59 articles were reviewed at the abstract level and 29 of them were appropriate for full evaluation. Upon additional review, only 14 articles matched the criteria for inclusion within this literature review. Of the selected articles, seven articles were theoretical about change management strategy with alignment as a subtopic or alignment as primary theory; three articles were based on primary research on alignment and change management; three articles were theoretical with a supporting case study on alignment in change management; and one article was a literature review on change management with a sub-topic area of alignment. Figure 1 is a diagram of



search results and specific topics by subject area. Table 1 represents a summary of all reviewed articles.

**Figure 1: Literature Review Process Flow and Results**



*Theoretical Review of Change Management and Creating Alignment:*

Seven articles provided substantive theoretical review only. Six of the articles were based on a broader change management strategy, addressing creating alignment as a subtopic, while one focused on alignment only. Several of the articles included the creation of alignment through vision, business unit objectives, and individual responsibilities as necessary components of a broader change management strategy.<sup>9,10,11,12,13,14</sup> Gill<sup>15</sup> focused on the synthesis of leadership qualities to evoke change from several well-known change management theories, including the ability to create a vision that leads to employee alignment with the change strategy. Sullivan et. al.<sup>16</sup> focused on the organizational values and ensuring alignment with individual values as change occurred. The article focused on the level of change from low-level environmental change to high-level identity change illustrating the need to ensure alignment between the organizational and individual values; the article posits that the higher the level of change, the greater the need to ensure alignment between values.

*Organizational Case Studies of Change Management and Creating Alignment:*

Three case studies of change management were reviewed within an anonymous hospital, Continental Airlines, and an unnamed organization (Martin et al.<sup>17</sup>, Higgins et al.<sup>18</sup>, and Shields<sup>19</sup>, respectively). Martin<sup>17</sup> described utilizing top management to implement enterprise resource planning, which represented a significant change to many organizations (2007). In the case study on the anonymous hospital, there was

acknowledgement that original enterprise planning failed due to lack of vision alignment and leadership alignment with the project. Subsequent new initiatives were considered successful due to support by senior leadership, but time had been wasted from previous projects that were extremely similar in scope and execution.

Higgins<sup>18</sup> presented a powerful case for cultural alignment with function and structure during a change management process with Continental Airlines. Continental Airlines focused on aligning several key areas in their effort to climb to higher customer satisfaction ratings, including aligning identifiable value systems and behavioral norms; aligning myths and sagas with new business strategy; aligning language and metaphors with new strategy; aligning symbols, ceremonies and rituals with new strategy; and aligning the physical environment with the new strategy.

Shields<sup>19</sup> focused on the theory that seven specific 'levers' had to be addressed and aligned within an organization during a change management initiative in order to create catalytic change. The seven levers to focus alignment are values and culture; work processes and business systems; individual and team competence; leadership; organization, team, and job design; rewards and recognition; and management processes and system.

*Primary Research of Creating Alignment:*

Three articles provided quality research on creating alignment in an organizational change management strategy. Middleton et. al.<sup>20</sup> and Johnson-Cramer et. al.<sup>21</sup> created research related to measuring alignment as a precondition to implementing large scale change and creating alignment within networks to manage change, respectively. While VanDeusen Lukas et. al.<sup>14</sup> focused on measuring presence of five change management processes from theoretical constructs within healthcare systems funded through the Robert Wood Johnson Pursuing Perfection research project. Middleton<sup>20</sup> focused on interviewing and providing questionnaires to 50 employees of one organization to assess alignment (defined for this research study as the employee's understanding of the company's goals). The article concluded the company's structures and rewards systems were not aligned with the company goals; also, there was a correlation between the company's ability to implement a large scale information system and employees feeling that innovation was rewarded. Johnston-Cramer<sup>21</sup> conducted interviews with a company's top 105 engineers to assess network connections and cultural alignment. The research team was able to map and monitor personality types and hierarchical status of individuals, resulting in the ability to find patterns to networking, cultural values, and ability to manage change.

The VanDeusen Lukas<sup>14</sup> article provided a mixed-method case study approach to measure the presence of change management theoretical processes, including alignment, within the change initiatives required to improve quality care in the funded health care systems in the Robert Wood Johnson Pursuing Perfection project. The

authors conducted comparative case studies over the course of 3.5 years with 12 health care systems and conducted over 750 semi-structured interviews. The ability to maintain alignment across all layers of the organization through shared vision, and work processes, goals, and accountability to the vision was critical to long-term success. The authors discussed the need to maintain vertical alignment from front-line staff objectives to long-term organizational goals. Also, it was noted that when alignment was addressed through the horizontal lines of the organization (integration), health care systems saw greater consistency and interconnectedness.

*Literature Review of Change Management:*

Oakland and Tanner<sup>22</sup> provided the only literature review included in this discussion. Alignment during change management programs was highlighted in two areas of the literature review: a requirement to align the need for change with the operational issues and the need to align cultural issues surrounding the change to support individual's behavior.

**Table 1: Articles Reviewed**

<b>Authors</b>	<b>Inclusion Criteria</b>	<b>Purpose</b>	<b>Methodology</b>	<b>Conclusion Related to Alignment</b>
Barki & Pinsonneault <sup>9</sup>	Alignment; organizational integration	Find overlap between theories of Organization	Theoretical	The authors presented 14 propositions to predict necessary effort to implement organizational integration (OI), impact

		onal Integratio n and Enterprise Resource Planning		of implementation, and influenced factors within organizational integration. The OI model described posits a performance relationship by introducing structural and environmental factors. Concluded that one of the moderating factors was the human and structure ability to align themselves with the OI model and change philosophy.
Gill <sup>15</sup>	Change managemen t; Leadership skills	Demonstr ate change managem ent requires leadership	Theoretical	Integrated leadership theory with qualities required to lead effective change management. Leaders are required to provide vision, values and culture, strategy, empowerment, motivation and inspiration to manage change successfully. Vision, or the ability to clarify the direction of change, helped individuals align themselves to the necessary actions.
Higgins & McAllaster <sup>18</sup>	Change managemen t; Alignment	Explain the steps Continent al Airlines utilized to change historical processes and storytellin g to maintain	Case Study	The authors focused on a case study design about Continental Airlines with a focus on corporate culture change. The authors maintained it was necessary to align organizational structure, systems and processes, leadership styles, staffing, resources and organizational culture in

		new change.		order to manage strategy execution. The authors theorized when culture and systems are not aligned with the new vision, employees became confused about priorities and did not change.
Johnson-Cramer et. al. <sup>21</sup>	Strategic change through Networks; Alignment	Discover communication networks and individuals within a system who are seen as important agents to change process	Primary research	The authors discovered network and communications dynamics through a series of interviews with organizations. In order to influence and manage change, managers needed to understand the dynamics between individuals and in the culture to effectively change structural and network alignment. Also, organizations should identify the trusted individuals and utilize them in the alignment process.
LaMarsh <sup>10</sup>	Change management	Strategic framework for utilizing Six Sigma as	Theoretical	Utilized a Six Sigma strategy to explain necessary components to change management. Steps described include planning for resistance, defining change roles and individuals associated with them, finding resistance and building a communication plan, learning plan, and reward plan. Included scoring measurement for assessing organizational



				readiness to change.
Martin & Huq <sup>17</sup>	Leadership alignment	Demonstrate leadership commitment to cultural, environmental factors and change management	Theoretical with case study	The authors maintained a leadership engagement strategy was necessary to move towards enterprise resource planning design and implementation. It was posited that top management's influence for change was best utilized in the focus area of cultural and environmental factors to change employees' behaviors and led to documented success.
Mento et. al. <sup>11</sup>	Change management	Create unified change management steps utilizing three theoretical positions	Theoretical	Reviewed three popular change management structures by Kotter, Jick, and General Electric and created a 12-step guide to change management. Alignment was addressed in one step of the guide.
Middleton & Harper <sup>20</sup>	Alignment; Change management	Measure alignment pre- and post-implementation of information system	Primary research	The authors administered a questionnaire to measure organizational alignment before implementing an information system change management process. The authors concluded that innovation and creativity are not rewarded in organizations without demonstrated alignment.
Oakland & Tanner <sup>22</sup>	Change management	Identify factors that were	Primary research	The authors conducted interviews with multiple organizations' senior

		reported as critical to successful implementation of change management in private and public sector organizations.		managers to compare change management strategies with main points from the literature on critical success factors. Process changes, organizational structure, supervision and organizational systems were recommended to be aligned within the business units affected and their objectives in order to ensure success.
Price & Chahal <sup>12</sup>	Change management	Development of a strategic framework for change management	Comparison of change management theory to published case studies	The authors focused on aligning and creating ownership within the organizational culture to ensure successful change management. A six-step process was formed as a framework for organizational change management: 1) Preparing the organization; 2) Developing the vision and implementation plan; 3) Checking; 4) Communications and workforce engagement; 5) Implementation; and 6) Evaluation
Rogers et. al. <sup>13</sup>	Change management; Leadership	Development of a strategic framework for change management	Theoretical - utilizing case studies in support of theory	The authors posited a nine-step change management process that focused on leadership, programming, and communication. Alignment was addressed as a requirement for change

				and to be integrated in leadership engagement, training, and communicating the vision.
Shields <sup>19</sup>	Alignment; Change managemen t	Developm ent of a strategic framewor k to change that focuses on the individuals within the process	Theoretical with fictitious case studies	Five areas of success were introduced, described and illustrated. These five areas are 1) Define desired business results and develop change plan; 2) Create capability and capacity to change; 3) Design innovative solutions; 4) Develop and deploy solutions; and 5) Reinforce and sustain the business benefits. The individual must be viewed as core to all five areas for success.
Sullivan et. al. <sup>16</sup>	Alignment; Organizatio nal change	Identify how individual values and organizati onal values interact for change managem ent.	Theoretical	The article focused on the need to create alignment between individual and organizational values to support change management processes. Values were defined as the individual's and organization's small set of guiding principles.
VanDeusen Lukas et. al. <sup>14</sup>	Alignment; Change Managemen t	Identify applicatio n of five sub- theories of change managem ent, including alignment and the	Primary Research	Alignment in vision, work processes, goals, and integration across all verticals and horizontals within an organization were required for change to be successful. Many organizations maintained alignment from senior staff to front-line to ensure everyone working

		relative success to induce change within organizations		toward common goals with success to change initiative.
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## Discussion

Creating alignment within an organization, no matter the type of change management process, was represented in the literature by three topic areas, case studies of individual organizations, change management and alignment theory, and a small number of research studies. While theoretical articles add to the discussion and contribute to knowledge, there was little applied knowledge from the articles in review. Also, the case studies represented a theoretical application overlaid a singular event in organizational history without a clear pre-test/post-test design of the application. The limited nature of high quality research to test theoretical knowledge or apply this knowledge was readily apparent in this literature review.

There were only three articles found that represented quality research studies surrounding creating alignment during a change management process. The research studies' main focuses were 1) understanding intra-organizational networks in promoting change,<sup>21</sup> 2) measuring organizational alignment before implementation of an information system project and measuring success of the change management

strategy,<sup>20</sup> and 3) measuring alignment as one of five requirements for a successful change management strategy within health care system quality initiatives.<sup>14</sup> While the articles dealt with the concept of creating alignment and monitoring alignment during or before change management, the Johnson-Cramer<sup>21</sup> and VanDeusen Lukas<sup>14</sup> article made recommendations for creating alignment based on the outcomes. The Middleton<sup>20</sup> article focused on the analysis and derived conclusions. The Middleton<sup>20</sup> and Johnson-Cramer<sup>21</sup> research studies represented quality analysis of somewhat subjective characteristics; they are limited by researching characteristics of a singular event versus inclusion of multiple events or organizational processes during the change event. The VanDeusen Lukas<sup>14</sup> article took a long-term approach at multiple sites to measure alignment within varying levels of an organization. While the VanDeusen Lukas<sup>14</sup> article represented a significant health care related alignment article, it was limited by the nature of the 12 health care systems interviewed; all health care systems had made a significant commitment to create a quality improvement change strategy.

The literature review did make clear the necessity of creating alignment within an organization during a change management process. Alignment from two perspectives, broad vision and system support, was repeatedly viewed as the lynch pin to success. Alignment in broad vision provided the ability for the organizations and key stakeholders to understand and believe the reasons for and potential of the change management strategy. The system supported alignment required all departmental decisions and goals changed to represent the new vision and changed processes.

Based on this literature review, several gaps in the literature related to creating alignment during a change management process became readily apparent. Also, there was a substantial gap in high quality research identified related to the application of theory or case study experience. As the United States healthcare industry changes and public health organizational practices have to change in order to maintain effectiveness and relevance, there is substantial opportunity to monitor a changing health leadership environment with qualitative research.

The identified gap in publications based on high quality research leaves a large opportunity for qualitative research on change management leadership in healthcare organizations and/or non-profit organizations. One publication, relative to a theoretical discussion, addressed the need for creating alignment in all aspects of organizational business and individual motivation to create an organization with change capacity versus the constant need to keep separate change management practices; change capacity being the need to address successive change strategies versus a singular change event. Research related to the process of implementation or growth of change capacity would be extremely relevant in today's ever-evolving healthcare environment.

The American Cancer Society had the opportunity to apply successful alignment practices and/or correct flaws in the change management strategy prior to the launch of the cause strategy. The consultants and leaders should have researched the practice of

creating alignment and the ability to integrate the change initiative into all areas of the organization as it embarked on a massive change in branding strategy and worked to advance several large initiatives on its heels. The success of the change strategy for branding would have broad implications for other changes planned in the next two years.

This literature review is limited by the lack of primary research in leadership change management, lack of United States based case studies or research, and lack of healthcare organization publications. Methodology to find the literature could be improved to include snowballing techniques and focusing in on journals that maintain change management as a specialty of the publication.

### **Chapter 3: Statement of Purpose**

The American Cancer Society historically had engaged in prescribed activities to manage change. However, there had been little documented process for creating alignment between NHO departments and Divisions. In spite of a robust governance and committee structure, there have been few attempts to evaluate and monitor a strategic change management process to insure all affected parties are in agreement and aligned before and after the intervention. Also, there had been little retrospective evaluation to note the long-term effectiveness of the change management strategy.

This case study attempted to answer the question: Did the American Cancer Society successfully create alignment during a change management process to create and implement a nationwide cause-branding strategy? Creating alignment was chosen as the focus because of the incredible amount of inter-departmental and NHO-Division decisions and business practice changes that needed to be agreed to and implemented together. Also, it narrowed the focus within the change management discussion to a manageable level of inquiry.

In order to answer the central question, a subset of research questions was answered in the analysis:

- Identify and describe internal processes to change cause-branding strategy in the American Cancer Society.



- Assess the strengths and challenges of each major decision point during the change process.
- Assess the ability to create alignment across departments and Divisions surrounding key decisions.

Because this study identified critical areas of business for the American Cancer Society, it will be important to establish a potential process for creating alignment and managing strategic change/decisions throughout the organization moving forward.

## **Chapter 4: Methods & Analysis**

### Study Concepts

The primary concept for this study was creating organizational alignment within an organizational change management process. Organizational alignment was defined as the ability to bring strategic vision, work processes, and employee rewards together to achieve a given change strategy.<sup>23</sup> Most importantly, these three items must be achieved across multiple departments or business units to create the movement necessary for the total organization. The product of organizational alignment would be the ability for all staff and business units to understand the organization's goals and the individual's role in achieving them.<sup>24</sup>

### Description of Conceptual Model

This dissertation is a case study on the ability of the American Cancer Society to go through a strategic change management process and create internal alignment to launch a new cause-branding strategy. The change management process began in 2007, was completed in fall 2009 and the plan was executed on through the summer of 2010. Overall change management within ACS was too broad to monitor, specifically this case study focuses on the creation of alignment within the organization between three

groups. Organizational alignment was reviewed and measured for these separate points:

1) Inter-departmental at the National Home Office – Numerous departments within the National Home Office (NHO) needed to reach agreement and maintain alignment in order to create a meaningful cause-branding strategy. NHO departments that were affected are Health Promotions, Cancer Control Science, Development, Marketing, Corporate Communications, and the Office of the Chief Operating Officer. All other departments did not have a stake in the external partnerships affected by a cause-branding strategy. By measuring alignment within NHO, it provided a view point of horizontal alignment across departments.

2) Intra-organizational between NHO and Divisions – The relationship between NHO and Division affiliates required alignment to insure effective execution of the cause-branding strategy in a meaningful manner at the community level. Also, mutual understanding of various policy changes was critical to perception of the executed strategy.

3) Inter-committee between Steering Committee and Design Team – Two workgroup committees made up the guiding force of the cause branding strategy change, Steering Committee and Design Team. Steering Committee members included executive leadership within NHO and the Divisions while Design Team membership was implementation-level staff at NHO and in the Divisions. By measuring between committee alignment, it provided an understanding of the ability to create vertical alignment within the organization.

## Study Approach & Design

A case study approach was utilized to review, describe, and assert recommendations within this dissertation for the American Cancer Society. Case studies have the ability to provide explanatory framework for events where there was no modification or control in behavioral events. Also, the events being monitored are contemporary and actively being implemented at this time.<sup>25</sup> The case study will provide deep analysis on one situation within organizational history for future understanding.

This case study utilized a retrospective and prospective approach to understand the situational conditions at the American Cancer Society. It utilized a mixed-method, non-experimental approach that employed two main sources of data:

1.) Organizational Documentation Data – This category of data established the organizational components and steps managed during the internal change process. Committee established direction, decisions, and movement toward vision and work process alignment was available through substantive review of timelines and subject matter.

2.) Organizational Stakeholders – Interviews were conducted with committee members and members of the executive team to establish whether key alignment points for a negotiated joint vision of the change management process occurred.

Questions were asked to understand whether the interviewees had a shared organizational vision, a shared understanding of policy changes, and how work processes changed as a result.

This case study employed mostly qualitative methodologies. Quantitative methods were limited to descriptive statistics to illustrate interview results. Data collection was in two phases. First, secondary analyses of documents associated with the change management process were analyzed to establish timeline, group/committee interactions, and negotiated alignment points. Second, interviews were conducted with members of the related committees to establish whether there was a shared vision and a plan to change work processes. In order to examine interview results in context of negotiated alignment, interviewee response results were compared with timeline and policy documents in the documentation review.

#### Potential Conflict of Interest

The researcher for the case study had multiple roles associated with the cause branding change strategy. These roles were 1) as writer of the case study for her dissertation, 2) implementation team committee member during the strategy definition process, and 3) the strategy was one of the researcher's responsibilities at the time of launch. The researcher's active role in the development and implementation of the

work associated with this case study could result in strengths and challenges as the researcher on this project.

Strengths of having the researcher involved within the process included having an insiders view to all meetings and decision points. The insider view afforded the deep understanding of how much organizational change was involved with key decisions. In addition, it allowed her to gain quick access to all documentation from the consultant and interviewees. Interviews had quick rapport and ability to know when to probe on nuance within the discussions.

Challenges associated with having the researcher intimately involved within the project is bias associated with the researcher. ACS stakeholders could also perceive a conflict of interest with the researcher's professional ambitions versus ability to stay unbiased in creating the case study. Individuals participating in the interview process and providing documentation have professional relationships with the researcher. Also, sections of the change management project, cause-branding, were one of the researcher's organizational responsibilities at the time of implementation.

In an attempt to limit bias with the committee members and interviewees, the researcher communicated case study responsibilities to participants on each strategic decision-making committee. Appendix A is an email sent from Steering Committee lead Scott Bennett to the group about the Researcher's role in the meetings in an attempt to

limit the perception of a conflict of interest and greater understanding of role delineation. Also, to limit interviewee false-positive interview results, confidentiality and honest assessment were stressed during the interviews.

Conflict of interest was also limited by the removal of the researcher's independent strategy decisions over the project. The researcher was never in a position of influencing strategic direction or outcomes of the implementation as an individual. Instead, implementation was overseen by an implementation group outside of the leadership direction of the researcher. Efficacy of the Choose You launch and implementation work was independently evaluated by the internal market research group. The researcher was not consulted to provide direction or advisement to the internal market research department.

### Data Collection

As previously discussed, data collection was two-pronged: 1) organizational document review and 2) stakeholder interviews. The University of North Carolina at Chapel Hill Institutional Review Board reviewed the study in November 2009. In that same month, the IRB provided notification that this study was exempted from further review based on regulatory category 45 CFR 46.101(b). Document collection and interviews began in November 2009 and continued through February 2010.

### *Organizational Document Review*

The document review process served two purposes. First, documents were utilized to establish a timeline of events and decisions. Second, documents and timeline identified key communications, decision points and attempts to move vision and process to create alignment. Criteria for document selection was 1) broad organization-wide communications, 2) inter- and intra-committee communications, and 3) material created by the marketing vendor for use in decisions. Timeline was established by date stamping all of these documents and compiling the results.

Documents included in the review process were located through meeting timetables and the paid marketing agency, Cone. Also, communications of decision points were centralized to the marketing agency throughout the change management process. Accessing and including the meeting documents, communications that included decision points, policy documents, and strategy announcements through the external agency, ACS organizational internal communications database, and the marketing department provided sufficient documentation to include in the review. Appendix B represents a full list of document titles with description of information with additional Appendix labels. In addition, Appendix E - M are the full contents of each document.

### *Stakeholder Interviews*



Stakeholder interviews were conducted with individuals who represented departments and/or divisions of the organization that were on the Steering Committee or the Design Team. A subset of workgroup participants from NHO and Divisions were selected and invited to participate in the interview process. Stakeholders were selected based on one or more of the following criteria: 1) Participation in the cause-branding strategy change management process either at steering committee or design team level; 2) Organizational responsibility for strategy or implementation of one aspect of cause-branding strategy; and 3) Sphere of influence within the organization dictated inclusion in the interviews (e.g. governance structure between NHO and Divisions). Appendix C is the question guide asked of interviewees to assess ability to articulate the vision, communication regarding policy decisions, and changes in work processes associated with the cause branding strategy change. Because of the lack of literature or prior research focus on alignment, there was no existing interview guide in the literature that could be adopted for this research.

Interviewees were recruited through an email request by a consultant to the dissertation process, Chief Mission Delivery Officer Terry Music. Appendix D is the email communication sent to all interviewees. All eleven invited interviewees agreed to participate. Interview participants were provided detailed, written background on the study purpose and objectives before the interview. Before the interview began, participants were given verbal details on the study purpose with the opportunity to ask

questions on the study and written consent form. All participants were asked to sign a written consent form before the interview commenced.

All interviews were conducted in-person and were recorded and transcribed with only organizational and/or departmental descriptors included in the transcript. Results from the interviews were reviewed for themes, key issue or word counts and summarized in a table format by question with themed subject areas identified. Interviewee responses were grouped by NHO, Division, and by committee representation. Interviews for inter-workgroup review consisted of 45% Steering Committee and 55% Design Team representation.

### Data Analysis

A content analysis of the internal documents and stakeholder interviews was completed to identify key themes. A comparative analysis between policy documents and interviews was conducted to monitor the extent each contributing variable met or failed to create alignment. Once categorical themes were identified, frequency counts and measurements were provided to support the analysis of the case study. These descriptive statistics were utilized only to provide additional explanation to the information learned during the interviews and document review process.

## Chapter 5: Results

This chapter describes the findings from the 1) document review on outcomes from committees and 2) interviews with members of the Steering Committee and Design Team. Document review was first utilized to identify the timeline of events’ as a descriptive review to inform interviews and to track alignment related topics within the interview guide. Interviews were conducted from November 2009 through January 2010. Table 2 shows the timeline of events from May 2007 to May 2010. In addition, Table 3 shows a description of interviewees.

**Table 2: Timeline of Events for Cause-Branding Strategy Decisions & Implementation**

Date	Event
May 2007	Identification of Need: Change in strategy identified as necessary for growth in cause revenue, brand awareness, and mission engagement
June 2007	Marketing vendors solicited
July 2007	Cone, a cause branding agency, is selected as vendor
November 2007	Vendor began ACS internal, external corporate, and volunteer governance interviews to inform strategy, issue identification (platform topic) and change management needs
	Steering Committee formed
January 2008	Design Team formed
February 2008	Initial issue identification Cancer Prevention & Caregivers or Minorities and Disparities in Health
March 2008	Issue identified: Policy change needs reviewed with Steering Committee
April 2008	Issue Solidified: Cancer Prevention & Caregivers with target audience of women
	Sponsorship stratification for asset activation – beginning

	of conversation with Steering Committee
June 2008	Organizational asset review for inclusion in prevention platform
July 2008	Platform market research with corporate partners
September 2008	Confirmed platform name, 'Choose You'; Identified significant need to review sponsorship related to four categories – 1) General; 2) Pharmaceutical, Biotech, Healthcare; 3) Consumer Packaged Goods – Ingestible & Noningestible; and 4) Mass Merchandiser, Retail, Stores
October 2008 – January 2009	Review of decision making criteria – scientific OUT filters; Appendix K show dates on all meetings and decision points.
February 2009	Sponsorship policies and monetizing the platform solidified
March 2009	Began selling Choose You to potential nationwide sponsors
September 2009	Design Team broken into implementation groups for planning of launch in May 2010. Groups were employer outreach, website, communications and PR planning
May 2010	Launch of Choose You in Times Square; national components of activation only

**Table 3: Description of Interviewees**

<b>Committee Type</b>	<b>Steering Committee</b>	<b>Design Team</b>	
	5	6	
<b>Staff Office</b>	<b>National Home Office</b>	<b>Division</b>	
	8	3	
<b>Leadership Level</b>	<b>Chief-level</b>	<b>Senior Leadership Team</b>	<b>Director</b>
	4	2	6

Document review and interviews focused in on two specific areas of alignment theory that many believe carry significant weight for the success of a change management strategy, a shared vision for the change and work processes to support the change in strategy. In addition, two additional areas were reviewed to understand

whether a shared mental model had been created surrounding policy changes. A shared mental model would demonstrate an organizational understanding had been reached for policy changes surrounding the change strategy. The other additional area is the identification of informal networks associated with change strategy, attempting to gain understanding of trusted sources of information during a strategic change process.

Interviewees were asked two questions regarding ability to identify their relationship to the cause branding strategy and their role in the new cause branding strategy. The questions were “What is your relationship to the cause branding strategy?” and “How do you see your role in the new cause branding strategy?”. Of the eleven interviews, eight individuals (73%) identified their committee membership as part of their relationship to the cause branding strategy (steering committee or design team) and three individuals (27%) identified their current set of responsibilities (operational job responsibilities) as their primary relationship to the cause branding strategy. Interviewees identified four areas as their role within the new cause branding strategy, those roles were related to ultimate owner (1; 9%), leadership championing (2; 18%), contributor to strategy development (3; 27%), and implementation (5; 45%).

## **VISION**

Vision is the one area within a change strategy that is required to be consistent, delivered by leadership, and stated often. It provides a guidepost for individuals to

reference during a change strategy. 'Why are we doing this?', 'What is the goal of making the change?', and 'Help me understand the intent' are often statements or questions easily answered or addressed when a vision is clear, succinct, and repeated often. Change management theory abounds with recommendations on identifying and communicating the vision for an organizational change. Providing a clear, consistent position and guide to an organization allows for the formation of direction, expectations, and self-identification.

#### **Alignment on Vision: Interview Questions 4 – 7**

##### **“Cause allows us to raise money and spread the gospel”**

Interviewees were asked a series of questions to gauge their ability to articulate the change in cause branding vision; recall as many components of that vision; and identify the person, place, or time they heard that vision. All interviewees replied that they felt they understood the organizational purpose or vision for cause-branding when asked the question “Do you feel like you have an understanding of the organizational purpose or vision of the cause branding strategy?” Responses to the question were, ‘I do’; ‘yes’; ‘absolutely’; ‘fairly certain’; and ‘I believe that I do’.

Interviewees were asked two questions in order to elicit 1) identification of the core purpose or vision and 2) to name as many parts of the vision as they could. The first question was “What do you see as the core purpose or vision of the cause branding

strategy?” When asked for the core purpose, interviewee responses fell into seven areas: income, prevention, corporate relationships, brand awareness, system change (public health), consumer purchasing, and mission delivery – general. Interviewee responses ranged from identifying one to three core areas: three people identified 3 core areas; seven people identified 2 core areas; and one person identified 1 core area for a total of 24 areas identified from the eleven interviewees. Table 4 shows the categorized responses from all interviewees in the seven areas, with income (73%) and brand awareness (64%) having the highest area of focus for the core vision.

**Table 4: Total Responses for ‘Core purpose or vision for cause branding strategy’**

Responses	Total Responses	% of Individuals
Income	8	73%
Brand Awareness	7	64%
Corporate Relationships	3	27%
Mission	3	27%
Prevention	1	9%
Systems Change	1	9%
Consumer Purchasing	1	9%

Between group analysis, Steering Committee vs. Design Team and NHO vs. Division, shows a slight change in order of core purpose. Steering Committee members and NHO staff placed a higher value on income while Design Team and Division staff placed brand awareness as the core purpose. Only one Division staff person identified income as a core purpose of the cause branding strategy. Table 5 shows responses and % of all subgroups.

**Table 5: All Subgroup Responses for ‘Core purpose or vision for cause branding strategy’**

<b>Responses</b>	<b>Total</b>	<b>% of Total</b>	<b>SC</b>	<b>% of SC</b>	<b>DT</b>	<b>% of DT</b>	<b>NHO</b>	<b>% of NHO</b>	<b>Div</b>	<b>% of Div</b>
Income	8	73%	5	100 %	3	50%	7	88%	1	33%
Brand Awareness	7	64%	3	60%	4	67%	4	50%	3	100 %
Corp Relations	3	27%	1	20%	2	33%	1	13%	2	67%
Mission	3	27%	1	20%	2	33%	3	38%	0	0%
Prevention	1	9%	1	20%	0	0%	1	13%	0	0%
System Change	1	9%	1	20%	0	0%	1	13%	0	0%
Consumer Purchasing	1	9%	0	0%	1	17%	1	13%	0	0%

In the second part of the question, interviewees were asked to identify as many parts of the vision or purpose as they could. The solicitation was “Share as many elements of that purpose as you can think of right now.” The expansion of the question elicited a total of 34 responses from the eleven interviewees that were grouped into eleven areas: corporate income, corporate relationships, brand awareness, consumer directed sales, market reach, general mission, income, prevention, systems change, social networking, and general marketing. Table 6 shows how the interviewees ranked the eleven identified areas.

**Table 6: Share as many elements of that purpose that you can think of right now**

<b>Responses</b>	<b>Total Responses</b>	<b>% of Individuals</b>
Income	7	64%
Brand Awareness	6	55%
Market Reach	6	55%



Corporate Relationships	4	36%
Prevention	3	27%
Consumer Directed/Sales	3	27%
Corporate Income	1	9%
Mission (General)	1	9%
Systems Change (Public Health)	1	9%
Social Networking	1	9%
Marketing (General)	1	9%

Between group analysis, Steering Committee vs. Design Team and NHO vs.

Division, shows a slight change in selection of elements. Steering Committee members, Design Team members, and NHO staff were more likely to cite brand awareness as a key element than Division staff. While Division staff and Steering Committee members were more likely to state a 'health' related element, i.e. systems change, prevention, mission.

Table 7 shows responses and % of all subgroups.

**Table 7: All subgroup responses for 'Share as many elements of that core purpose' question**

Responses	Total	% of Total	SC	% of SC	DT	% of DT	NHO	% of NHO	Div	% of Div
Income	7	64%	3	60%	4	67%	5	63%	2	67%
Brand Awareness	6	55%	3	60%	3	50%	5	63%	1	33%
Market Reach	6	55%	2	40%	4	67%	4	50%	2	67%
Corporate Relationships	4	36%	2	40%	2	33%	3	38%	1	33%
Prevention	3	27%	2	40%	1	17%	1	13%	2	67%
Consumer Directed/Sales	3	27%	1	20%	2	33%	2	25%	1	33%
Corporate	1	9%	1	20%	0	0%	1	13%	0	0%

Income										
Mission (General)	1	9%	1	20%	0	0%	1	13%	0	0%
Systems Change (Public Health)	1	9%	1	20%	0	0%	1	13%	0	0%
Social Networking	1	9%	1	20%	0	0%	1	13%	0	0%
Marketing (General)	1	9%	0	0%	1	17%	0	0%	1	33%

After being asked to identify aspects of the vision, interviewees were asked to identify how they heard the vision and who they heard it from. The intent of the question was for individuals to identify the source of the vision and the communication strategy behind sharing the identified vision with staff. The question interviewees received was “How has that vision been communicated to you and by whom?”

Individuals responded with a distinct set of responses that could be catalogued into four key areas for how they heard about the vision, responses included as individuals, they were responsible for creating it, they heard through decision making or integration groups, specific individuals were named as the communicator or it was not communicated at all. Each of these responses with associated counts is presented in Table 8.

**Table 8: How has that been communicated to you and by whom?**

Response	Total	% of Total
Created vision	2	18%
Decision making groups	10	91%
Communication strategies	3	27%

Specific people, e.g. Scott Bennett & staff, Greg Donaldson	6	55%
Not Communicated	2	18%

### **Alignment on Vision: Document Review**

Documents associated with the cause branding strategy were reviewed and assessed for inclusion of alignment principles in this case study, vision and work processes. Each document was categorized as to the audience of the communication and title of the document. Also, references to purpose of the cause branding strategy or vision for cause branding strategy were noted. Table 9 details each document related to vision and allows for comparison with interviewee responses and committee membership.

**Table 9: Document review for Vision**

<b>Document</b>	<b>Appendix</b>	<b>Audience</b>	<b>Stated Vision for Cause Branding Strategy</b>
Terry Music 1 <sup>st</sup> Announcement	Appendix E	All ACS staff	1) Corporate collaborations 2) Brand 3) Income 4) Mission
Steering Committee Invitation Charter	Appendix F	Steering Committee members	1) Income 2) Mission 3) Visibility (Awareness)
Design Team Invitation Charter	Appendix G	Design Team members	1) Income 2) Mission 3) Visibility

			(Awareness)
PowerPoint opening slides from committee meetings	Appendix H	All meetings	1) Cone's assignment 2) Deliver platform 3) Internal policy revisions
Terry Music's Launch Announcement	Appendix I	All ACS staff	1) Women's health 2) Prevention

When reviewing the documents compared to the interviewee responses, some connections can be drawn between the committee responses and vision statements from the documents. Steering committee members ranked income and brand awareness highest; Design team members ranked income, brand awareness, mission, and corporate relationships as the core areas. However, when asked to name as many aspects of the vision as possible, design team members were more likely to leave mission-based activities, such as prevention and/or mission, out of their responses. This is a divergence from the steering committee members who included mission-based activities in the mission once requested to broaden the response to include all elements.

The communications on vision to all ACS staff and within each of the meetings also sends different messages than the original steering committee and design team charters. The majority of meetings opened with a PowerPoint slide stating the consultant's objectives, but did not verbalize in writing the ACS vision objectives. Also, the launch communication diverges in vision for the platform from the original communicated vision to exclude income, brand awareness, and mission as the intent of

the platform. Instead the communication focuses on a description of what the intended Choose You platform is: women’s health and prevention.

### **Personal Value: Interview Question 8**

#### **“Force multiplier ... it unlocks the power of collaboration”**

Interviewees were asked a single question to understand personal vision and value for the cause strategy, “What do you value most about the cause branding strategy for the American Cancer Society?” While previous questions focused on communicated vision and understanding of the cause branding vision, this question asked about personal value in the change. While not strictly relevant to organizational alignment, it begins to show how individuals’ involved in the strategy focused their attention. It also begins to show where individuals’ created their own personal change vision and expectations for the change strategy.

Responses to the question were categorized in two manners, 1) for themes the response represented similar to prior vision statements or new vision statements and 2) for the emotional connection or investment associated with each response as it relates to a past perception or future expectation. Table 10 illustrates each interviewee response with category and emotional connection, whether past or future reflection.

**Table 10: Personal value category and emotional investment**

Interviewee	Personal Value Category	Past Emotional Investment	Future Emotional Investment
1	Income; Collaboration	"Historically weak for us"	"Force multiplier – it unlocks the power of collaboration"; "Broadens and deepens an area of our fundraising portfolio"
2	Transformation		"I believe strongly that it is a key element in transformational change"; "I think this has the opportunity to be transformative"
3	Corporate relationships		"That we are finally, aggressively doing it"; "It is going to be eye opening"; "It is exciting"; "No place to go but up"
4	Income; Public health	"I worry about our fiscal health"	"Being able to influence Coca-Cola company to market messages on diet control, caloric control"; "Being able to leverage public health messages in cause-brand marketing"
5	Income; Business practice	"Economic imperative"	"I appreciate the inclusiveness"; "We used good business practice throughout the process"
6	Strategic approach to business	"ACS needed to be doing more cause branding";	"I see us being strategic and going

		“Our cause marketing approach had been very reactive”	after companies”; “I also see this as a huge opportunity to get our prevention messages out there”; “I hope that we leverage this as best as we can”
7	Collaboration; Transformation		“Enterprise wide partnerships internally and externally”; “It is such a galvanizing opportunity”
8	Business improvements		“The CBRT meetings have made a huge difference in the speed that we conduct business”
9	Brand; New audience engagement	“Our brand in the market has been stale and flat”	“The cause branding strategy allows us to talk to an audience that we typically haven’t, well and well worried”; “Allows reengagement in a meaningful way”
10	Income; Collaboration		“More credible positioning with corporate decision makers”
11	Relevance; New audience	“We have been lagging behind in consumer relevancy”; “Not engaged in meaningful way with consumers”	“I hope this creates a more powerful engine to reach people”

Many individuals identified an area that they valued most that was in agreement with some aspect of the vision communicated in one or more of the communication pieces. However, what was more telling in the answers were the personal past perceptions or future expectations regarding the change in cause branding strategy. Many individuals used some type of adverb or adjective stressor to imply a greater sense of urgency, personal excitement, or organizational dependency in the cause branding change. Such statements as, 'more credible'; 'I hope'; 'galvanizing opportunity'; 'economic imperative'; and 'transformational change', all have a great degree of personal expectation wrapped in the meaning of those statements.

### **Work Processes to Support Change**

Another key element of creating alignment is ensuring the operations of the organizations makes adjustments to support the change and resultant functions. Change initiatives require defining owners, departmental responsibilities to the new function, and identifying individual responsibilities. Clear understanding and communication about needs, deliverables, and expectations at both individual and departmental levels is required to ensure transparency, ownership, and long-term support for the change is identified.

### **Alignment on Work Processes: Interview Questions 9 – 13**

**"We have to believe in this to get folks to understand"**



Work processes associated with a new change management strategy or a result of the change strategy are represented within the questionnaire at three levels: knowledge of departmental level work process changes, knowledge of individual level work process changes and policy changes associated with the change (policy will be covered in the next section). To understand knowledge of departmental and individual work processes, interviewees were asked a series of questions regarding departmental responsibilities; changes within the department to support the new strategy; individual responsibilities; change to individual responsibilities to support the new strategy; and communication of these changes in work processes. Each question will be addressed separately.

Interviewees were asked the question, “When thinking about the implementation of the new cause branding strategy, can you describe for me your department/division responsibilities?” Responses to the question to delineate understanding of departmental or division responsibilities to the cause branding strategy elicited a range of responses that were related to specific deliverables in the strategy by type of work associated with the department. Given the interviewees were selected based on a broad representation of departments and divisions, it is not possible to share responses without identifying information being disclosed. However, it did become clear in the answers that some interviewees could not differentiate individual work responsibilities versus departmental responsibilities even when probed

further for specifics. To review the question as ability to verbalize department versus individual responsibilities, responses were simply categorized as ‘yes’ or ‘no’. ‘Yes’ representing that the individual was able to articulate his or her department responsibilities. Table 11 shows the break down between total responses and by committee representative.

**Table 11: Can you describe for me your department/division’s responsibilities?**

<b>Able to Differentiate</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	8	4	4	5	3
No	3	1	2	3	0
% Yes	73%	80%	67%	62.5%	100%

While the majority of interviewees were able to communicate departmental level responsibilities versus individual responsibilities, the Design Team showed slightly less ability to verbalize at the departmental level across respondents then individuals from the Steering Committee. However, all respondents that could not differentiate the difference were NHO staff members.

Interviewees were asked to identify changes within their department or division that have been implemented or that were implemented to support the new cause branding strategy with the question, “What changes have been implemented or will be implemented in support of the new cause branding strategy?” Responses were classified in two manners: 1) was there a change and 2) what was the type of change, illustrated in Tables 12 and 13, respectively.

**Table 12: Has there or will there be a change in departmental responsibilities?**

<b>Supporting Changes</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	6	3	3	5	1
No	5	2	3	3	2
% Yes	55%	60%	50%	62.5%	33%

**Table 13: Description of changes within department or division**

<b>Response Themes</b>	<b>Number of Responses</b>
Business process changes	3
Philosophical	2
Resource realignment	1
Reprioritize	1
Staffing changes	1
Financial controls	1

Responses were split fairly equal across all groups in regards to whether there have been changes made at the departmental level to support the cause branding strategy changes. The two most common responses were grouped by two themes, individuals who identified that a change had occurred acknowledged that it either was a business process change – how they conducted their day-to-day business related to cause branding, or a philosophical change – how they planned for our thought about the cause branding business. Other individuals acknowledge resource realignment, reprioritization of resources, and staff changes had occurred. However, with only a little over half of respondents noting that a change occurred – it should also be noted that as many people noted ‘no change’ that offered descriptors of change.

To gain understanding on work processes that changed at the individual-level in addition to departmental-level, interviewees were asked to describe their individual responsibilities to the cause branding platform and also describes changes that were made to support those responsibilities. Tables 14, 15, and 16 show the responses from interviewees on whether they were able to differentiate individual responsibilities from general responsibilities; whether respondents acknowledged a change in individual responsibilities; and the type of change interviewees will experience in regard to individual responsibilities for the cause branding strategy, respectively. Questions for Table 14 and 15 were “Can you describe your individual responsibilities toward the new cause branding strategy?”; “How have your responsibilities changed or will change with the new strategy or work processes?”, respectively.

**Table 14: Can you describe for me your individual responsibilities?**

<b>Able to Differentiate</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	9	5	4	7	2
No	2	0	2	1	1
% Yes	82%	100%	67%	88%	66%

**Table 15: Has there or will there be a change in individual responsibilities?**

<b>Supporting Changes</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	5	1	4	3	2
No	5	3	2	5	1
I Don't Know	1	1	0	0	0
% Yes	45%	20%	67%	38%	67%

**Table 16: Description of changes from the interviewees**

<b>Response Themes</b>	<b>Number of Responses</b>
Business process changes	1
Reprioritization of time	2
Reprioritization of importance	2
Committee work	2

A similar response pattern occurs with the individual responses that occurred with the departmental level responses. The majority of individuals could accurately describe the differences between their individual responsibilities from departmental responsibilities. In addition, once asked if there was a change in individual responsibilities, the responses were split between 'yes' and 'no' with one individual stating they did not know yet. However, at the Committee level, there was a difference between Steering Committee members and Design Team members. Steering Committee members were more likely to say there was no change to their responsibilities, where as Design Team members did state a change had occurred, citing committee work, reprioritization of work or importance of the cause branding work.

Interviewees were asked to identify how the departmental or individual responsibilities were communicated to them with the question, "How were those responsibilities communicated to you and your department or division?" There were a total of five different themes in the responses with the majority of responses falling into two categories. Responses were that there was no communication (4); individuals ascertained the changes necessary themselves (4); communication to their direct

supervisor (2); someone on the cause team told them (1); and responsibilities were directly requested (1). When reviewing the differences in responses by committee membership, Steering Committee members were the only ones to respond with an answer that was thematic of self-defining or ascertaining for themselves their responsibilities to the cause strategy. Also, Design Team members were more likely to have a request sent to their supervisor or a cause team member to request their change in responsibilities. Individuals who stated there was no communication at all were evenly split between Steering Committee and Design Team members.

### **Alignment on Work Processes: Document Review**

Document review against these questions is not possible. There was no centralized communication regarding departmental or individual responsibilities to the long-term cause branding strategy. Individuals were selected for committees based on job responsibilities at that time and/or perceived expertise in a given area. However, invitations to participate in the committee were not reflective of changes in accountability for cause branding or responsibilities that changed during the implementation.

A discrepancy surrounding expected changes in responsibilities for the cause branding strategy was readily apparent throughout the interviews. In addition, the lack of any formal communication on the topic could lead to inconsistency in personal or

departmental expectations. Individuals and/or departments could self-define roles and responsibilities leading to either over- or under-ownership of the strategy and long-term maintenance.

### **Policy Changes**

The initial stages of discovery on the American Cancer Society internal practices prior to the cause branding strategy were reviewed to understand if there were impediments to growth. However, policy changes are only as good as they are understood. Individuals within the organization need to be aware of the policy change, understand why the change was made, and be able to verbalize a shared mental model about the new policy. Without a shared understanding, confusion and incorrect expectations can result for individuals, leaders, and at the organizational level.

#### **Alignment on Policy Changes: Interview Questions 14a – 14c**

##### **Compared to Documents Associated with the Question**

As part of the change management process, there were areas of business identified for revision or review to catalyze the cause branding strategy. ACS decided to focus attention on three business areas that came up in pre-interviews with the consultant as needing improvement, 1) standards for decisions on who to partner with, 2) sales process, and 3) revenue share between NHO and Divisions. During the cause

branding strategy design, a series of meetings were held to delineate each of these areas. Decisions during the meetings were either submitted in writing as changes in business practice and policy or were sent as notes with PowerPoint slides.

The set of three questions were designed to assess if there had been a shift in understanding and a creation of a shared mental model for the organization around each topic. Interviewees were asked to share their understanding around each topic and identify how that would change their approach to the cause branding work. Responses were then compared against the finalized written background for each area to identify whether interviewees' understanding were in agreement with the documentation. The questions were, "During the process of defining the organizational cause branding strategy, several areas of internal policy were addressed. I'd like to ask you about your understanding of those changes. What is your understanding of the sponsorship standards changes or the companies we are willing to work with? How will that change your approach to corporate engagement? What is your understanding of the revenue share changes for the cause branding platform 'Choose You'? How will that change your approach to cause related engagements? What is your understanding of the sales roles and responsibilities involved in 'Choose You'? How does that change your approach to corporate sales?"

Policy changes surrounding who the organization would be willing to conduct business with had long been an area of internal debate. Over the course of several



meetings, outlined in Appendix L, Steering Committee members and organizational subject matter experts reached agreement on a series of evidence-based standards when making decisions on corporate partners. Table 17 outlines whether interviewee responses were able to establish understanding of the shared mental model surrounding evidence-based standards. Responses were categorized as ‘yes’ if interviewees made a statement about evidence-based standards, IARC guidelines, definitions on products, or philosophical change to ‘everything is in unless it is out’.

**Table 17: What is your understanding of the sponsorship standards changes or the companies we are willing to work with?**

<b>Able to Articulate</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	9 <sup>§</sup>	4	5	6	3
No	2	1	1	2	0
% Yes	82%	80%	83%	75%	100%

Responses to this question indicate a high degree of understanding among respondents. Consistency between responses and the codified policy changes indicate that a shared mental model was created for sponsorship standards. All subgroups had 75% or greater of the interviewees verbalize an understanding of the policy change.

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<sup>§</sup> One individual did not articulate the necessary criteria during this specific response. But in subsequent answers, they did acknowledge evidence-based standards. If you include the understanding outside of this response category, response totals change to 10 out of 11 interviewees articulated; 100% of Steering Committee members articulated; and 88% of NHO staff articulated the change. However, for purposes of this table, I will be true to including only responses during that answer.

Organizational revenue share structures are defined between the NHO and Division offices to support nationwide strategies while also incentivizing changes in Division staff outreach priorities. Revenue share decisions are often recommended within ACS to catalyze changes in a sales approach. Also, it allows for moving first dollar to pay for the build out of an advancement strategy. The revenue share model was built during a meeting of the NET and was realized by a group decision to combine two separate models into a hybrid. Table 18 represents whether responses represented the agreed upon hybrid revenue share model.

**Table 18: What is your understanding of the revenue share changes for the cause branding platform?**

<b>Able to Articulate</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	3	0	3	1	2
No	8	5	3	7	1
% Yes	27%	0%	50%	13%	67%

Responses to the question intended to gather whether a shared mental model surrounding revenue share policy changes had been created, show a lack of understanding on changes. The overwhelming majority of individuals could not describe the changes to the revenue share policy for the new cause branding strategy as compared to the documentation on the revenue share model created. Appendix L contains a slide created to outline the revenue share model. All individuals who were able to articulate the policy were members of the Design Team. Division staff had the highest rate of recall.

When thinking about the discrepancy between Steering Committee members (0% able to articulate) and Design Team members (50% able to articulate), there may be a pattern based on the decision making process on this specific policy. Revenue share was discussed over the course of two meetings, one with the Steering Committee and one with the NET. The Steering Committee members agreed to recommend a model to the NET for approval. However, discussion at the NET led to a hybrid model between two options. After the hybrid model was approved, there was no dissemination of a codified standard. Thus, Steering Committee members, while they participated in the NET discussion, had multiple mental models and no fall back decision document to review. In addition, Design Team members only received a communication about the decision instead of being actively involved in the choice. Design Team members who remembered the decision, were able to articulate the standard.

The last question surrounding policy changes was about the external sales strategy for corporate cause branding targets. Sales roles and responsibilities had been delineated between National account managers, departmental responsibilities and Division responsibilities. Table 19 represents whether interviewees were able to articulate understanding of sales roles and responsibilities within the new strategy.

**Table 19: What is your understanding of the sales roles and responsibilities involved for the cause branding platform?**

<b>Able to Articulate</b>	<b>Total</b>	<b>Steering Comm</b>	<b>Design Team</b>	<b>NHO</b>	<b>Div</b>
Yes	3	2	1	2	1
No	8	3	5	6	2
% Yes	27%	40%	17%	25%	33%

Sales roles and responsibilities are articulated in Appendix J. Comparison of responses to the written policy showed a low understanding about the sales roles and responsibilities for the cause branding strategy. The group that showed the highest understanding was NHO staff; however, overall totals only showed 27% of interviewees were able to accurately describe the changes.

A shared mental model was clearly created surrounding the policy on sponsorship standards. Almost all interviewees were able to verbalize key points or expectations. Also, participants cited the change in this policy as one of the pivotal points of the change strategy. Interviewee quotes on this topic included, “sound business practice,” and “I have to give an enormous shout out to evidence-based standards.” There was a significant amount of documentation and conversation across multiple levels of the organization to establish this policy.

The sales policy, however, show a mixed understanding of any changes. The sales responsibility outlined in the decision documentation does not provide a substantial amount of detail. According to the timeline and discussion, the sales roles and responsibilities were covered during one meeting each in the Steering Committee and Design Team. The revenue share policy was decided during a combination of

Steering Committee and NET meetings. The resultant hybrid model was not codified in a policy document for dissemination. Ultimately, these two conversations were handled very different in design and decision making than the sponsorship standards policy changes. As a result, the two policy changes do not demonstrate that a shared mental model was created around sales roles and responsibilities or revenue share.

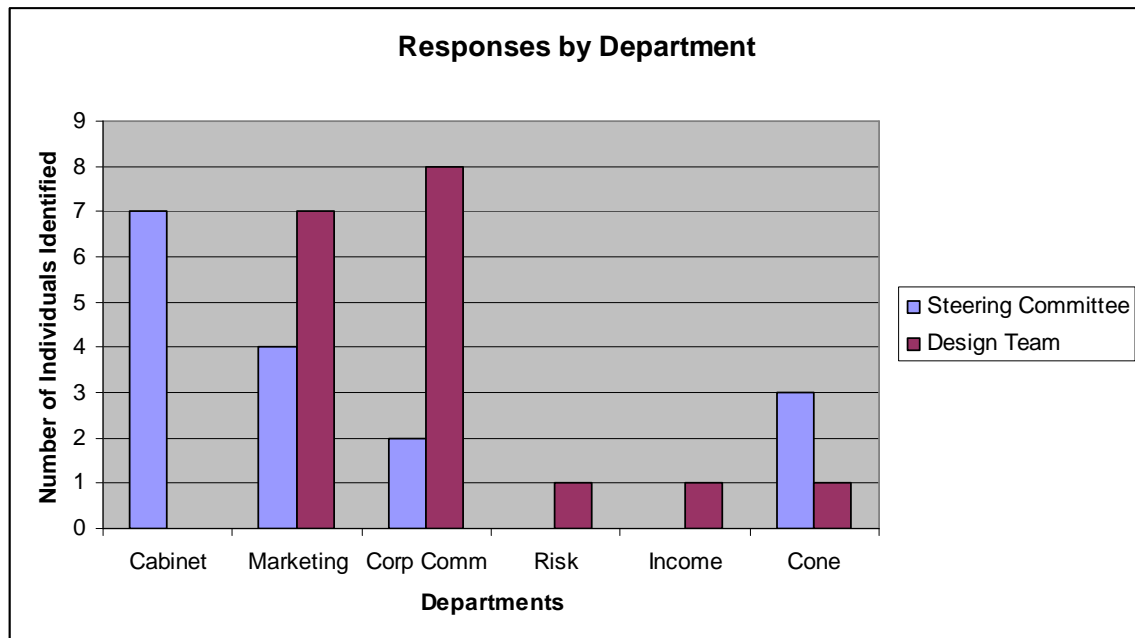
### **Informal Social Network in Support of Alignment: Question 15**

Informal work networks are becoming increasingly recognized for their ability to quickly disseminate information and promote collaboration across and between departments. Organizations such as Harvard Business School and McKinsey have published papers on the ability to motivate and harness the use of information networks for innovation, change, and fighting silo effects within business. Rob Cross and Andrew Parker<sup>26</sup> wrote in the book, *The Hidden Power of Social Networks: Understanding How Work Really Gets Done in Organizations*, “Managers who target strategic points in social networks can quickly increase an organization’s effectiveness, efficiency, and opportunities for innovation”.

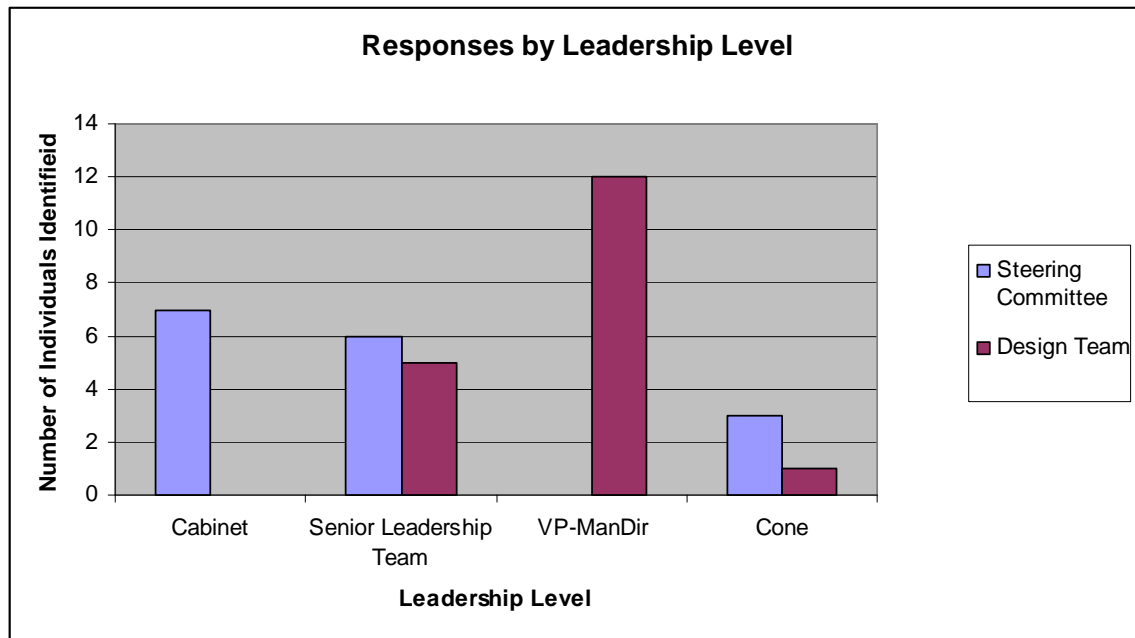
In order to understand if there was an informal social network at play among the committee members, interviewees were asked “During the cause branding strategy change, is there any person or people that you looked to for guidance or opinion?” Responses were categorized by committee membership and for the total. Also, roll-ups

to departments and leadership level were added to understand if there were lines between groups. In total, there were 34 individuals identified as someone that interviewees looked to for guidance and opinion. Figures 2 and 3 show responses split by committee membership and categorized to individual departmental information, respectively.

**Figure 2: Chart Showing Committee Responses by Department**



**Figure 3: Chart Showing Committee Responses by Leadership Level**



Responses show a clear pattern between Steering Committee and Design Team members. Steering Committee members were more likely to cite Cabinet members, Cone (agency), Marketing leadership or Corporate Communications leadership as their source for opinion or guidance while Design Team members were more likely to name Marketing, Corporate Communications, Risk Management staff, and Income leadership. In another difference between groups, Design Team members were more likely to cite a member of the Corporate Communications team than any other group.

In addition, there was a clear line between the groups when it came to the level of leadership they looked to for guidance and opinion. Steering Committee members only looked to Cabinet, Senior Leadership Team members, or Cone, whereas Design

Team members only looked to Senior Leadership Team or VP – Managing Director level staff. Steering Committee members did not cite anyone at the VP – Managing Director level, while Design Team members did not cite anyone at the Cabinet level. The two groups that seemed to be a trusted source for guidance from both committees were Senior Leadership Team members and Cone, the agency. Scott Bennett was the most cited individual among all interviewees as a source of guidance and information.

**Interview Analysis: Any Other Thoughts or Comments About the Cause Branding  
Strategy Change?**

“The single greatest risk that we face is our inconsistency.”

At the end of the interview, everyone was given a last opportunity to offer thoughts or comments in an open ended, generic question. Interpretation for what the individual wanted to offer was left to their discretion. Responses were far reaching, covering topics from integration, programs, long-term strategic planning for implementation, and hopes for the future. However, a review of responses finds that most fall into one of two areas. Interviewees used the opportunity to identify additional areas of concern and/or excitement that they felt needed to be identified.

Responses were categorically themed and are included below in Table 20 by defining topic of concern or excitement. Additional details from these responses will be utilized in the Discussion section to provide relevance and potentially greater visibility



into recommendations. However, when reviewed in light of the combination of the question related to personal value (Table 10) and the open-ended responses displayed below, a pattern emerges that bring together a theme of interviewees expressing hope for the change in strategy but also dismay about past experience or perceived inconsistencies in approach.

**Table 20: Open ended responses categorized by excitement or concern**

<b>Excitement</b>	<b>Concern</b>
Evidence-based standards	Internal integration (departmental)
Happy this is happening	Consistency in position
Looking forward to a few wins	Lack of integration with programs
Celebrity engagement	Aligning ourselves with companies who have different objectives than ours
Requirement for us to survive	Culture clash between science, research, and marketing
Gains could be worth the risk	Communication needs will have to be addressed
Improved business processes	Ability to have patience to build solid execution strategy
Long overdue for this organization	Lack of execution strategy or resource planning
	Too narrowly focused – doesn't play to our strengths
	Sales competencies
	Internal communication needs

## **Chapter 6: Discussion**

The intent of this case study was to answer the central question of whether the American Cancer Society was able to successfully create alignment during a change management process to create and implement a nationwide cause-branding strategy. In order to gain understanding on the central question, three sub questions were asked:

- 1) Identify and describe internal processes to change the cause-branding strategy in the American Cancer Society.
- 2) Assess the strengths and challenges of each major decision point during the change process.
- 3) Assess the ability to create alignment across departments and divisions surrounding key decisions.

Key informant interviews and an extensive document review were conducted to gain understanding about the queries. Responses were compared on key points of creating organizational alignment. In addition, tracking time periods, meetings, and key policy decisions in the document review compared to the creation of a shared mental model in the interviews, gave insight into the strengths and challenges of key decision

points. Responses from the interviews and information collected in the document review are consolidated to answer the key questions for this case study.

**Sub Question #1: Identify and describe internal processes to change the cause-branding strategy in the American Cancer Society.**

When reviewing the interviews and conducting the document review, it becomes clear the American Cancer Society conducted a significant amount of coordination and internal collaboration to initiate a change management process. By creating a timeline of events through the document review, it was identified the Society's process to change, create, and launch the cause-branding strategy took a total of three years from original identification of need to launch of the strategic platform. Three key internal processes were created or changed to negotiate the cause-branding strategy; these changes can be categorized by the consultant responsibilities, committee structures, and changes implemented for maintenance.

*Consultant Responsibilities*

Cone, a leader in designing and implementing cause-branding platforms for corporations and nonprofits, was hired by ACS to facilitate the discovery, design, and launch of the cause strategy. Cone's influence across the process was integral to many of the steps taken forward. In addition, their organizational knowledge was well

respected as was demonstrated in the response count from the key informant interviews on whom individuals looked to for guidance during the change process. Interviewees, in particular Steering Committee members, identified Cone as an influential voice in the process at a higher rate than Managing Director - VP level staff were identified by Steering Committee members.

As one of the first deliverables from Cone, they interviewed a cross section of leaders throughout the organization, corporate partners, and volunteer Board members to identify opportunity and necessary business process changes. Their interviews informed the potential type of cancer-related platform based on science and trends in cancer control. In addition, they created a baseline for organizational frustration or decision making surrounding cause partnerships. Both items provided fuel for future discussions on requirements for a review team dedicated for cause branding opportunities that is described within the sponsorship standard policy changes.

### *Committee Structures*

ACS built several committees to utilize as a vetting strategy at various levels within the organization. These committees had varying levels of responsibility and authority over the process, but the global intent across all was to gain consensus on topics or provide advisement to the developing strategy as necessary. Four levels of groups were created, Steering Committee, Design Team, implementation groups, and

decision making groups to advise sponsorship standards. Each committee/group had separate charges or sets of responsibilities. The Steering Committee and Design Team were the most formal with the longest period of service to the cause-branding strategy, while the implementation groups had a set schedule and decision groups for sponsorship standards were formed for ad hoc advisement on subject areas.

Steering Committee and Design Team membership consisted of a cross-section of NHO and Division staff at various levels of leadership. Steering Committee members were mostly Chief-level or Senior Leadership Team level staff while Design Team members were composed of mid-level leaders in the organization in various departments with cause-related responsibilities or knowledge. Steering Committee members were tasked with making the majority of guiding decisions about the platform, while Design Team members were given those decisions and discussed the next level of implementation necessary to support.

During the discussion surrounding sponsorship standards, organizational experts with experience in a given topic area were requested to serve in decision making groups to advise a specific subject area. These subject areas consisted of general standards, health care industry, consumer packaged goods: ingestibles, and consumer packaged goods: noningestibles. Composition of these meetings was integral to the shared understanding and willingness to move forward with corporate partners or brands that historically ACS was unwilling to partner with on campaigns. The groups were able to

move from a decision making process that was fraught with personal opinion to decision making utilizing evidenced-based science as the guidepost. The creation of a high-level of understanding about the shared mental model and policy changes surrounding these discussions demonstrates the intensive communication, consensus, and shared decision-making that occurred over the course of multiple meetings and between multiple committees.

The implementation groups were formed from a core set of Design Team members plus staff with day-to-day operational responsibilities in the subject area. Groups were formed around Employer Initiative (corporate wellness strategy), communications strategies, sponsorship, online engagement, brunch activities, and Determination integration. Implementation groups were formed eight months prior to the May 2010 launch. These groups focused on the specific launch requirements for each group. Update calls were held on a regular basis to keep all parties informed about progress. Once implementation groups were formed, the majority of input by Steering Committee and Design Team had been finalized.

#### *Maintenance of New Strategy*

After the original launch, ACS implemented a strategy team to oversee the year two outreach and growth strategy. However, the majority of responsibility for activation, outreach, and corporate partnerships continues to be shouldered by one

team, the marketing department. The consulting agency, Cone, is still utilized to continue to refine the implementation. At this point, there are only strategic discussions that happen within upper leadership at the National Home Office. Also, the formation of the Cause Brand Review Team was implemented and has been an active force in moving corporate discussions forward.

**Sub Question #2: Assess the strengths and challenges of each major decision point during the change process.**

During the change management process at ACS there were a significant number of decisions made surrounding the platform, the marketing strategy, the outreach strategy, and multiple other areas that were geared toward the target constituent. To remain faithful to the intent of the case study, for the purposes of the assessment of strengths and challenges, I will only focus on decisions that were reflective of the organization attempting to create alignment between departments and/or make a cross-department policy change on specific topic areas. Decisions that reflected the need for alignment were sponsorship standards, internal decision making processes, and revenue share. All three of these areas were reflected in the document review and interviews.

*Sponsorship Standards*

Sponsorship standards or the companies we are willing to work with on the cause platform were possibly the most robust and built out series of decisions throughout the change process. Historically, ACS staff did not have guidance or a consistent set of standards on corporate partners or brands that ACS would be willing to offer a brand-related opportunity. In addition, decisions were often applied inconsistently between companies or brands due to personnel queried for feedback. In order to create a consistent guideline that was not subject to personal opinion, the Steering Committee and Cone agreed to a set of decisions regarding corporate product type and appropriate partners.

Discussions and decisions were scheduled for individuals within the organization who held scientific responsibilities related to that product, senior leaders, and members of the Cabinet. Sponsorship standards meetings were scheduled on general standards, healthcare industry, ingestibles, and noningestibles. At the end of the discussions, filters or decision tree criteria had been created on each type of company or brand the organization would want or need to partner with for cause branding.

Strengths for the sponsorship standard decision points were well documented in the interviews and included the establishment of evidence-based criteria; all conversations were intended to be inclusive and multiple stakeholders were brought into the discussions; decisions were documented, reviewed, and distributed across multiple layers of the organization; and individuals perceived the standards were a good



balance between being an evidence-based organization and needing to grow a revenue source which resulted in a high-degree of understanding and positive response to these decisions. Challenges with this process were not easily discovered. The high alignment between the policy changes and interviews represented a shared consensus had been reached. The level of discussion and number of decisions that had to be reached took in total four months for the organization to solidify. Based on the timeline and document review, it is hard to understand whether that was caused by scheduling challenges with attendees or some discussions took longer to reach consensus.

#### *Internal Decision Making Processes*

Decision making processes for cause branding went through an extensive overhaul as part of the change process. Decision making on cause prior to the change in strategy was affectionately known as, ‘the ability for everyone to say no and no one to say yes’. It was often considered a long process with multiple people being able to voice opinion. As part of the cause strategy change, a consistent set of stakeholders, decision-making authorities, and standing meetings were set as the Cause Branding Review Team (CBRT). The CBRT responsibilities and authority are outlined in Appendix J.

Strengths of the decision to implement the CBRT to make decisions were again reflected in the interviews. Individuals commented on the improved business processes as either one of the pieces of work they were excited about or as a positive product of

the change process. Specific strengths were that the process was codified and implemented quickly; streamlining of decisions; consistent application of the sponsorship standards; and consistent representation from stakeholder departments. Challenges surrounding the decision to implement were only represented in interviews by departments not engaged in the CBRT. Lack of visibility to the process or decisions made within the CBRT for other groups seemed to be the only challenge.

### *Revenue Share*

The revenue share decision followed a different decision making path than the other areas for the cause branding change. Due to revenue being an integral piece of business to the entire organization, the Steering Committee decided to take a recommendation to the NET as the final decision making group. Prior to the discussion, Steering Committee members decided on a potential option and a spokesperson at the NET meeting. During the discussion, the NET reached consensus on a hybrid model of revenue share illustrated in Appendix L.

Strengths of the revenue share decision making include the ability to utilize the senior leadership and CEOs within the organization to deliberate and solidify the revenue share model. However, there were several challenges with the decision making as was demonstrated with the interview responses. Individuals were unable to verbalize their understanding of the decision; there was a lack of documentation and

communication surrounding the decision for the creation of an organizational memory; and the decision was made in one meeting whereas all other large scale decisions were held over the course of a broader, robust discussion.

#### *Identification of Decision Points that Were Not Discussed or Did Not Happen*

As part of the review on decision points, it was discovered that a few areas could have been highlighted for further discussion during the change management process. These areas were either met with a lack of understanding in the interviews and/or minimal written documentation. Broader discussions were necessary on sales team roles and responsibilities, departmental responsibilities and resultant individual responsibilities, and Division level responsibilities or when a Division would be responsible for Choose You. Confusion on all of these areas between interviewees was demonstrated. In addition, a high level of expectation surrounding the cause strategy change along with lack of understanding on responsibilities could result in frustration long term.

#### **Sub Question #3: Assess the ability to create alignment across departments and Divisions surrounding key decisions.**

For purposes of this question, the key decisions outlined above, sponsorship standards, decision making criteria, and revenue share, will make up the assessment on

whether alignment was created. In order to judge whether alignment was created across these key decisions, it is imperative to understand whether there was a shared mental model or documentation on a vision and resulting work processes for each decision point.

Alignment on the decision point of sponsorship standards was the strongest of all major decisions. There was clear understanding of the vision, individuals could recall the intent of the decision, and work processes were put into place to support the change in standards. All decisions were codified for future review. Companies were proactively targeted based on the evidence-based standards to support outreach and brand engagement.

Alignment on the decision point of internal decision-making, or the Cause Branding Review Team, was also quite high. Although not as many individuals proactively talked about the CBRT in the interviews, several operational-implementation level staff cited the CBRT as a significant improvement in business process. The vision for the CBRT and the work processes to support it were clearly outlined in the written documentation for the change in strategy. Individuals also identified and understood the need to empower staff responsible for cause branding with maintaining the decision roundtable.

Alignment on the decision regarding revenue share was half-way attained. There was clear work processes put in place to manage new revenue associated with the cause branding strategy change. However, there was not a clear stated vision for the revenue share strategy. Interviewees were not able to recall the hybrid model created at a consistent rate. Also, written documentation of the decision was not distributed widely. While the organization was operating under the new decision, the change was not disseminated broadly enough to be understood or create a shared vision.

One area identified to create further alignment was in the organization's decision or lack of decision on sales roles and responsibilities. There was not an in depth discussion or a shared understanding created regarding sales roles and responsibilities. There is limited documentation on the subject and interviews pointed to a lack of clarity on this topic.

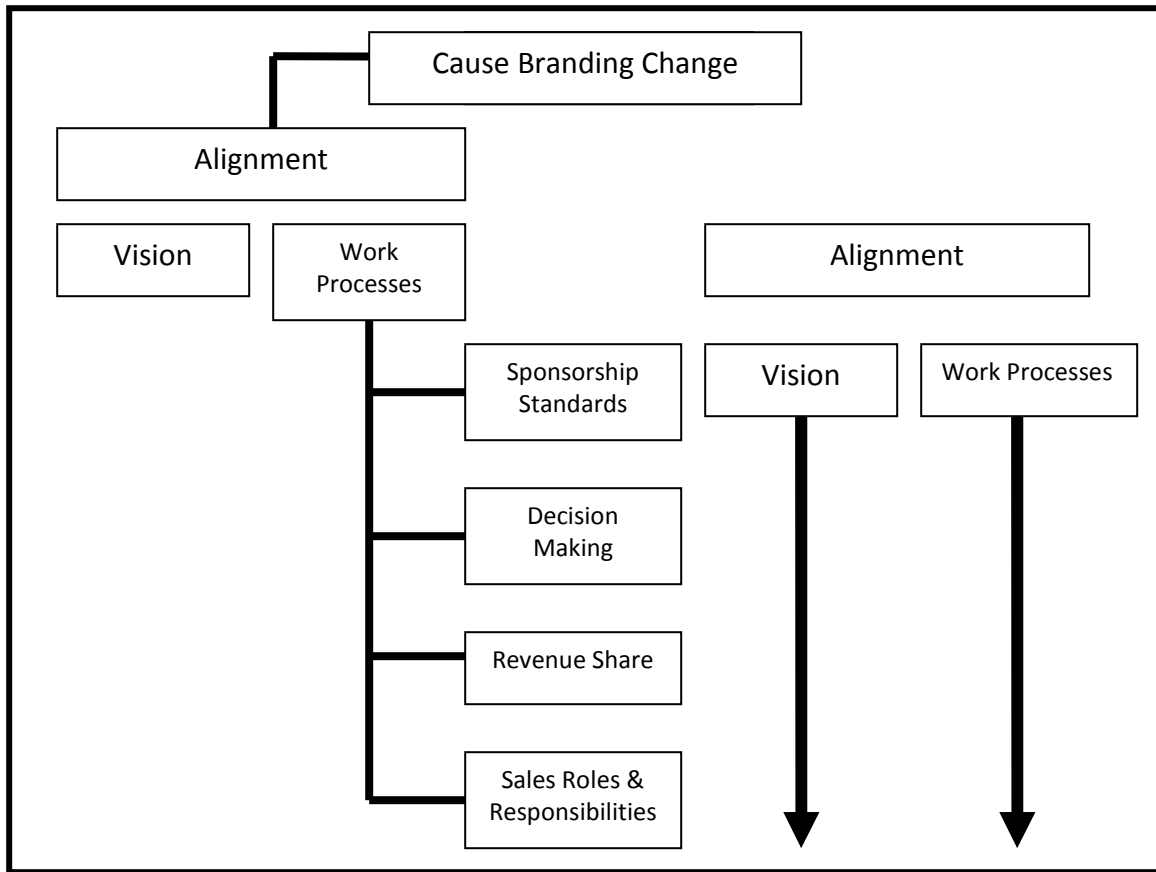
**Central Question: Was the American Cancer Society able to successfully create alignment during a change management process to create and implement a nationwide cause-branding strategy?**

The answer to this question is multi-faceted. While alignment theory points to two specific areas that were being reviewed for this case study, vision and work processes, it is also imperative to understand the significant amount of changes that

occurred to support the master change and how to view those in light of alignment theory. During the course of the case study, it became apparent that there was not just a need for alignment on the overall change management process, but also for several sub-changes that occurred during the course of discussion.

Each policy or new change needs to be framed as a sub-alignment process. The framework begins to take shape to support each major decision point with an alignment process as well. Figure 4 shows the points relevant to highlight the alignment discussion for ACS. With this separation of alignment into two levels, the question becomes divided into subsections, is there alignment at the organizational change strategy level and is there alignment at each new policy/work process that the organization is creating.

**Figure 4: Alignment and Sub-alignment Points for Cause-branding Change**



### *Master Change*

Responses from the individuals during the interview process and review of the documents points to there being a shared vision for the cause-branding strategy and need for change. Interviewees all expressed one or more of the vision qualities set forth in the documents through announcements, invitations, or meetings. Work processes, however, had a mixed review of whether individuals understood their and their departments' responsibilities to the cause-branding strategy.

#### *Sub-Change: Sponsorship Standards*

The majority of interviewees was able to describe the vision or shared mental model for the sponsorship standards as they were explained within the supporting documents. Repeatedly, interviewees expressed that evidence-based standards were the underpinning for the vision on sponsorship standards. In addition, work processes were clearly spelled out and codified within the document review process.

#### *Sub-Change: Decision Making*

The creation of standardized decision making criteria through the Cause Branding Review Team was delineated during several committee meetings. There was also a substantial amount of documentation on the CBRT created post-committee meetings. While decision making did not have its own question in the interview, several individuals identified it as part of the sponsorship standards and there was clear documentation of a vision and the work processes for it.

#### *Sub-Change: Revenue Share*

Revenue share discussions represented a change in direction for the typical committee structure. Final decision was made by the NET and the decision was not codified or distributed widely. Vision for the revenue share was not documented and



only a handful of interviewees were able to describe. However, work processes were set up to handle the change decided at the NET meeting. Unfortunately, even though work processes were established, not everyone had an understanding of the shared decision.

#### *Sub-Change: Sales Roles and Responsibilities*

Sales Roles and Responsibilities were also met with a lack of common understanding surrounding the vision. Interviewees could not consistently describe the vision for the sales roles and responsibilities. When reviewing the documents, it was unclear there was a clear delineation between departments or responsible parties.

#### *Hope and Dismay*

During the interviews, individuals had the opportunity to respond to questions about what they personally valued and any free form thoughts towards the end. Within that context, individuals responded in one of two manners or both, 1) excitement and hope at the prospect of what the cause branding strategy could provide ACS and/or 2) dismay about some aspect of the strategy, whether it was process, integration, or past experience. In particular, expectation was interwoven on both sides of the hope and dismay pattern – either expectations for things to be better for the strategy or expectations for what the strategy meant to the organization.

The context of personal expectation and experience of the cause branding strategy can potentially play a theme through the pattern of alignment or non-alignment on core issues for the organization. As individuals lack understanding what their role and responsibility is towards the change, they may have displayed more anxiety or dismay surrounding the accomplishments or repeating past experiences. However, the more individuals understood the vision and purpose of the strategy change, the more hope or positive expectations for long-term engagement could have been verbalized.

To consolidate each area identified for alignment, Table 21 demonstrates in simple form the subsections that demonstrated alignment. As can be seen, areas demonstrated alignment when dialogue was concentrated on a specific topic and when there was a dual pronged dissemination strategy for the decisions, in both verbal review and codified in writing.

**Table 21: Alignment by Subcategory**

<b>Alignment &amp; Demonstrated Model Across All Areas</b>			
<b>Topic</b>	<b>Vision</b>	<b>Work Processes</b>	<b>Alignment</b>
Master Change	√	X	X
Sponsorship Standards	√	√	√
Decision Making	√	√	√
Revenue Share	X	√	X
Sales Roles & Responsibilities	X	X	X

Some aspects of the creation of alignment for this change strategy required to move ahead of other aspects. For instance, it was an organizational imperative to have a new set of requirements to enter corporate level agreements. This required a significant amount of attention towards one subject area with a very deliberate process. If the area of sponsorship standards did not reach alignment, there was not going to be any progress moving forward with the initiative. Thus, from the stand point of required alignment areas versus areas that could be deemed as second level alignment needs, sponsorship standards and decision making requirements would have risen to the top.

## **Chapter 7: Plan For Change**

Alignment within change management is often associated as one of the key success factors within a change strategy or movement. Being able to create a clear understanding of the vision, work processes associated with the change, and create a rewards or accountability structure are the three action steps to insure alignment is created. While this case study only dealt with the first two due to timing of the change strategy roll out, this chapter will also include the third assumption within alignment, rewards.

Within the case study, there were identified areas that worked, where consensus and mutual understanding created a shared sense of excitement and support. However, in the areas that were associated with lack of understanding or inability to understand the vision, there was confusion, lack of support, or a requested need for greater communication. This divergence between clear alignment in some areas and no alignment in others leads the focus of this chapter to two areas, a plan for change to continue the evolution and creation of alignment for the new cause branding strategy and a plan for change that creates a roadmap for creating alignment to apply in other change management strategies at the American Cancer Society.

## Plan For Change: Cause Branding Strategy Recommendations

An alignment roadmap is easily deciphered through the areas within the cause strategy that had the greatest consensus on a shared mental model (verbal responses) and also the documentation. The existing committee structure worked well to move discussion items between setting strategy (Steering Committee) to understanding operations (Design Team). The two subject areas that showed clear alignment, sponsorship standards and decision making, had three common principles: 1) small group discussions with experts, 2) presentations across all committees for additional discussion, and 3) written codified standards that were available for distribution.

The 'aligned' areas created a model that worked. At its core, the model was to utilize a core group of individuals from the Steering Committee, Design Team, and identified key stakeholders or influential people on the topic at hand to engage in a concentrated discussion about one topic at a time. Each discussion led with science-based or operational evidence about the topic as a comparison to current ACS practice. Dialogue was continually shifted and narrowed to decision point criteria until consensus among the stakeholders was reached. Once consensus was reached, presentations and written standards were delivered across committee structures and leadership groups.

Based on the alignment successes, the following recommendations can be made for continued growth in the cause branding strategy:

1. **Revisit Decision Needs with Existing Committees.** ACS staff can revitalize the existing Steering Committee and Design Team structure to review existing areas of alignment needs. By utilizing existing committees, it shortens information processing and speeds discussion among key stakeholders. Also, reviewing the 'wins' of where alignment was achieved could empower the committees to proactively tackle the last two areas for review.
2. **Define Decision Groups.** Decision groups need to be created for two distinct purposes a) define work processes, individual and departmental responsibilities, to the entire new cause strategy and b) define a vision and work processes, individual and departmental, surrounding sales roles and responsibilities. Each group should have membership that spans the Steering Committee and Design Team; in addition, influential stakeholders in each area should be invited to engage in the discussion. Meetings should be set and facilitated to follow the successful model used during the sponsorship standards discussions.
3. **Codify Decisions.** Once consensus has been reached within the decision groups, decisions should be codified and disseminated to appropriate parties to include Steering Committee, Design Team, departments with responsibilities, and leadership teams. For historical purposes, decisions should be disseminated in written and presentation format.

**4. Create a Consolidated Communication Strategy.** Once all decisions are made and codified, capitalize on the opportunity to communicate broadly the ability of the organization to create consensus driven alignment that meets the stated vision. In addition, communicate all vision statements for each change and resulting work processes. By addressing in a unified package and strategy, individuals will also have exposure to the vision for the change in revenue strategy for the cause change. Thus, addressing the last area that lacked a shared mental model identified during the interview process. ACS leadership could utilize as a proof point in our ability to transform key operational structures.

#### Plan for Change: Organizational Alignment Recommendations

Key lessons learned from the cause branding strategy change can be applied to the majority of ACS's organizational change management initiatives. By creating a standardized alignment process, the organization would be able to quickly identify important areas of convergence and divergence on change initiatives. ACS would also be empowered to have a faster decision making process with clear lines of ownership and accountability. Recommendations for ACS to utilize to create alignment in future change strategies are:

1. **Utilize a Dual Committee Structure.** The dual committee structure of strategy and operations provides the organization with a mechanism to move decisions to execution at a faster pace. The organization as a whole has multiple silos of departments and divisions, from internal agencies to separate field-level divisions. By adding a dual committee structure, decisions are able to progress through the channels of decisions at a faster pace for implementation because it cuts through the usual layers of complexity and policy. It potentially allows the organization to step outside the typical decision making chain to gain consensus across silos without slowing down responsiveness.

As long as engaged individuals are fully briefed on responsibilities to the committee and to the execution strategy, there is opportunity to have a rapid pipeline from strategy to execution. Committee structures should not be utilized as update only forums; committees need to be utilized for advisement on unfolding change management strategies.

2. **Provide Definition to Alignment Layers.** The dual committee structure should provide clear direction and definition surrounding requirements to achieve alignment, clear and consistent vision, work processes that define individual and departmental responsibilities, and rewards that provide an accountability structure at the organizational, departmental, and individual level. Figure 5

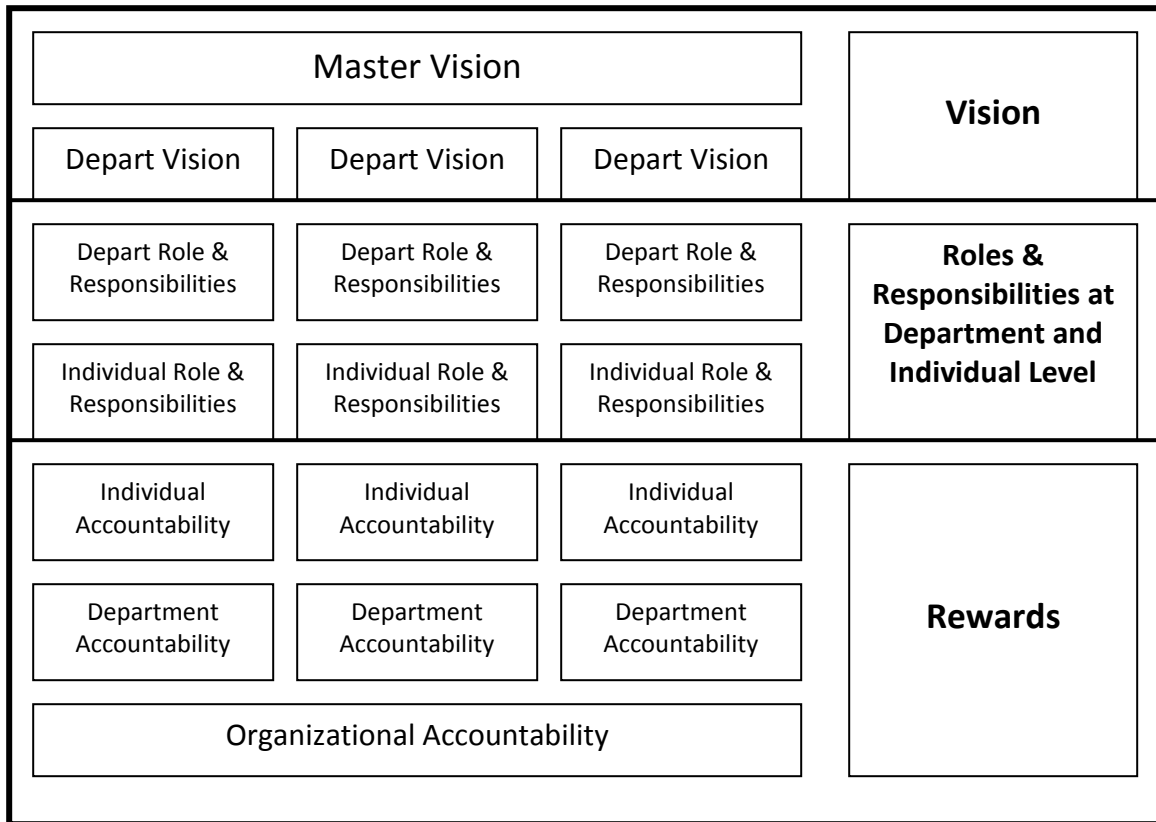


outlines a workflow for the dual committee structure to formalize all aspects of alignment.

As learned in the cause strategy, each initiative within a master change strategy should go through a similar workflow. The reasoning or vision should provide a clear 'why' for a change that results in individual or departmental level responsibility changes. In addition, individual and departmental goals, rewards, or accountability structures should be built in a manner to allow insertion of personal and departmental goals. Each change management strategy should also be fully embedded and provide clear upward direction to how this affects the organization's mission or departmental strategy, e.g. 2015 goals, Integrated Fundraising Plan, etc...

While accountability had not been dealt with as part of this case study, building in accountability structures for this change strategy and long-term change initiatives will have resounding effects to drive performance towards the vision. Organizational accountability should be the broad-based goal that all departments and divisions are attempting to move towards, while departmental and individual goals will begin the process of slicing up responsibilities to the greater organizational goal.

**Figure 5: Workflow for the Creation of Alignment**



2. **Communicate a Consistent Message with Broad Reach.** During the interview process, it was apparent that some individuals did not receive enough communication surrounding the change strategy, whether they were on the Steering Committee or Design Team. In addition, vision statements were not consistent in each message with the need or intent of the change strategy. Creating a consistent knowledge base within the organization requires thorough communications; communication needs to provide a consistent vision statement and realistic assessments of status, including decisions made or pending decisions. Stakeholder groups could be identified to provide tailored

communications as decisions are made that may affect certain individuals or departments.

There are multiple types of individuals in the ACS, having a broad range of individuals or methods to communicate is just as important as maintaining the same core message throughout all communications. Individuals have identified a 'voice' or preferred method of receiving communications from internal sources. However, regardless of mode or individual providing the delivery a set of core messages needs to be utilized throughout all channels.

4. **Utilize Informal and Formal Influencers.** The interviews identified individuals and departments that had formal and informal influence over decisions and/or opinion. It was quickly visible that individuals did not seek advisement outside their own leadership level or only to one leadership level above or below them; thus, creating a seemingly small sphere of influence to the change strategy and to the decisions being made at both committee levels. Leadership could model trust in decision-making outside of the senior management level only by including multi-levels of leadership within important organization discussions.

Typically, ACS seeks leadership driven recommendations for identifying influencers within the Director-level or below ranks. However, by utilizing a model that identifies the informal influencers, there may be more rapid

adoption. Informal influencers may not be the same as the leadership-only identified influencers. For instance, while Scott Bennett was a clear influencer over both committees during the cause change strategy, there were also informal influencers identified in the Design Team that centered more in the Corporate Communications department. Informal influencers could provide momentum or knowledge that is not being tapped or capitalized on due to formal ownership structures.

5. **Utilize Ad-Hoc Decision Groups to Quickly Address Identified Issues.** Core issues throughout a change management process always exist, whether those are cultural norms, policy related, or organizational and structural responsibility issues. Interviews and document reviews consistently pointed to the shared knowledge and understanding of issues that were moved through a core decision making group process within the cause branding strategy.

As a dual committee structure identifies organizational 'sacred cows' that need to be addressed, they need to be moved to an ad-hoc decision group formed of committee members, leaders in the subject, and identified or informal leaders in the area. Decisions should be communicated through written and verbal documentation. Once decisions are formal, all should be codified and circulated.

#### Additional Thoughts

Today, the American Cancer Society has begun the process of transforming - a process fraught with change and potential. As everyone defines what transformation means to them as individuals in an organization with an incredible history and impact on the health of America, leadership fights to define and implement a vision for what a transformed ACS is going to be tomorrow. By implementing a framework for establishing organizational alignment moving forward, I hope to provide a roadmap that enables the transformation process. In addition to the roadmap, maintaining a long-term structure for reviewing status of alignment versus annual or biannual goals should create an internal longitudinal view of maintaining a clear sequence between vision, work processes, and accountability.

In addition to alignment theory, the steps outlined for both the cause branding strategy needs and the organizational alignment needs can also address trust with leadership and between departments by providing greater visibility to the decision making processes; greater communication about roles, responsibilities, and organizational accountability on each change initiative provides consistent knowledge between groups on expectations; and provides an easy structure for leadership to maintain long term.

As an organization proposing to undertake successive change initiatives in order to create broad scale reform, ACS should consider how to create change capacity at the

organizational level. The ability to create change capacity, not just for a singular event, but instead focusing on a framework or system that enables quick response to a changing environment, requires understanding the dynamic between daily operations, singular change events, and capability to implement subsequent changes.<sup>27</sup> The greater visibility, participation, and mutual decision-making afforded throughout the organization, the greater the ability to create an environment agile enough to respond to environmental or innovative pressures. By creating an environment with open source understanding of work process requirements, active participation and influence, and a visible change framework, the Society will begin building a capacity for long-term change initiatives.

**Appendix A**  
Memorandum from Scott Bennett

To: Steering Committee Members  
From: Scott Bennett  
Date: November 17, 2008  
Subject: Cause Branding Steering Committee Note

Folks, perhaps you have noticed that Joanne Pike has attended our recent Cause Branding Steering Committee meetings. And perhaps you have noticed that Joanne is quite quiet in our meetings!

Many of you may know that Joanne is currently working on her doctorate at University of North Carolina - Chapel Hill. She has chosen the topic of strategic change management in ACS as her dissertation topic and is utilizing the cause-branding strategy as the study focus. Guy Fisher and I are members of her dissertation committee, and Terry Music is a consultant to her project.

Her main objective in the Steering Committee meetings is to listen and apply to her academic setting as opposed to provide direction or opinion. Joanne expects to begin data collection and interviews in support of her dissertation sometime in Fall 2009. While she continues to be an active (and vocal) participant in the Design Team, Joanne will maintain academic rigor in her role on the Steering Committee and remain a passive observer.

If you have any questions, let me know. You can also free to ask Joanne questions directly.

Thank you,

Scott

Scott Bennett  
National Vice President, Marketing  
American Cancer Society  
250 Williams Street, NW  
Atlanta, GA 30303  
Phone: 404-929-6895  
Fax: 404-329.7737  
Mobile: 214-287-1800

**Appendix B**  
List of Documents from Document Review

1. 1<sup>st</sup> Announcement – Terry Music.....Appendix E
2. Invitation to Participate in Steering Committee.....Appendix F
3. Invitation to Participate in Design Team.....Appendix G
4. Cone PowerPoint Opening Slide.....Appendix H
5. Cause-Branding Launch Memo – Terry Music.....Appendix I
6. Cause-Branding Decision Making Process.....Appendix J
7. Cause-Branding Sponsorship Standards.....Appendix K
8. Cause-Branding Revenue Share Model.....Appendix L



## **Appendix C**

### **Interview Guide**

#### **Information about Interviewee**

What is your current position?

What is your relationship to the cause-branding strategy?

How do you see your role in the new cause-branding strategy?

#### **Alignment Related Questions: Vision**

- 1) Do you feel like you have an understanding of the organizational purpose or vision of the cause-branding strategy?
- 2) What do you see as the core purpose or vision of the cause branding strategy?
- 3) Share as many elements of that purpose as you can think of right now.
- 4) How has that vision been communicated to you and by whom?
- 5) What do you value most about the cause-branding strategy for the American Cancer Society?

#### **Alignment Related Questions: Work Processes**

- 6) When thinking about the implementation of the new cause branding strategy, can you describe for me your department/division responsibilities?
- 7) What changes have been implemented or will be implemented in support of the new cause branding strategy?
- 8) Can you describe your individual responsibilities toward the new cause branding strategy?
- 9) How have your responsibilities changed or will change with the new strategy and/or work processes?
- 10) How were those responsibilities communicated to you and your department or division?

11) During the process of defining the organizational cause branding strategy, several areas of internal policy were addressed. I'd like to ask you about your understanding of those changes.

a) What is your understanding of the sponsorship standards changes or the companies we are willing to work with? How will that change your approach to corporate engagement?

b) What is your understanding of the revenue share changes for the cause branding platform 'Choose You'? How will that change your approach to cause-related engagements?

c) What is your understanding of the sales roles and responsibilities involved in 'Choose You'? How does that change your approach to corporate sales?

### **General**

12) During the cause branding strategy change, is there any person or people that you looked to for guidance or opinion?

13) Any other thoughts or comments about the cause branding strategy change?

## **Appendix D**

### **Invitation to Participate in Dissertation Interviews**

To: Potential Interviewees

From: Terry Music, Chief Mission Delivery Officer, American Cancer Society

Subject: Case Study on Cause-Branding Strategy

As many of you are aware, K. Joanne Pike has been working on her doctorate in public health leadership at University of North Carolina at Chapel Hill. She is now in the process of beginning to work on her dissertation. The executive team at the National Home Office approved her focus on the change management process of the cause-branding strategy and I have been functioning as a consultant to her dissertation.

The dissertation is being written in a case study design and will require interviews with fifteen individuals involved in the cause-branding steering committee, design team, and implementation workgroups. The interviews will be qualitative in nature and will focus on the organization's ability to create alignment on this important change management process. You have been identified as a potential interviewee for her dissertation based on your role on one of these committees.

Joanne will be reaching out to you to discuss your interest and gain your consent, if you are willing. At that time, she will schedule your in-person interview. Do not hesitate to let myself or Joanne know if you have questions or concerns. Joanne's contact information is 512.743.9035 or [jpik@caner.org](mailto:jpik@caner.org).

Thank you for your assistance,

Terry Music

Chief Mission Delivery Officer

**Appendix E**  
**1<sup>st</sup> Announcement – Terry Music**

**A Message from Interim Chief Mission Officer Terry Music**

March 20, 2008

**Society Engages Cone in Cause Branding Strategy Initiative**

Historically the American Cancer Society has been successful in raising approximately \$15-20 million annually in revenue, promotional support and contributed services through its various cause marketing programs. Today, cause marketing is a \$1.5 billion dollar industry and more consumers than ever are choosing to do business with companies and non-profit organizations that do cause-related work. For us this means that there is tremendous opportunity for the Society to capitalize on new and unique corporate collaborations that help build brand, raise money, and move mission.

To that end, the national Society has engaged world-class cause branding firm Cone, creators of the highly successful American Heart Association Go Red for Women campaign and numerous other corporate cause branding initiatives, to analyze our current cause marketing practices, revisit our overall cause branding strategy, and develop distinct cause platforms that can integrate our current communications resources, mission-based services, and income development activities to incite passion in our brand and raise significant funds to advance our cause.

As always, Division and NHO collaboration will be critical to the success of this process. The initiative's executive sponsors, Scott Bennett, national vice president marketing, and Guy Fischer, chief development officer, will rely on a Steering Committee comprised of key nationwide staff leaders to provide strategic oversight and a cross-functional Design Team, comprised of national and Division representatives, to provide insight and input for the initiative. Rosters for these teams can be found on [The Link](#).

Cone has already completed the first phase of the initiative, which included more than 60 interviews with staff and volunteers nationwide, discussions with current cause marketing collaborators, a competitive analysis, and a review of current practices. With guidance from our Steering Committee and Design Team, Cone will complete phase two concept development work by May 1, and phase three key target and outreach plan by December.

I hope you are as excited as I am about this important new endeavor for the Society. We will keep you informed as things progress. I thank you for your dedication to our mission and your continued support for all that the Society does to accomplish our goal of eliminating cancer as a major health problem.

**Appendix F**  
**Invitation to Participate in Steering Committee**

**American Cancer Society**  
**Cause Branding and Corporate Cause Partnership**  
**Steering Committee Charter**

**Committee Vision**

Work together as one team to provide relevant and timely input to the development of American Cancer Society's Cause Branding and Corporate Cause Partnership strategy with a goal of helping to establish the Society as a proactive, strategic, and sought-after corporate partner.

**Business Objectives**

Work with Cone to develop aggressive Cause Branding and Corporate Cause Partnership strategy to maximize fundraising, mission delivery and visibility opportunities for the American Cancer Society.

**Committee Member Roles/Responsibilities**

Serve as the decision makers who respond to Cone's recommended approaches for building a Cause Branding Platform and Corporate Cause Partnership Strategy  
Provide feedback and insight as to how recommended approaches might advance the Society's income and mission delivery objectives and overcome prior organizational challenges. Serve as ambassadors for the process.

**Operating Principles**

Committee members will:

- Work collaboratively as one team with a Society-centric approach, meeting both nationwide and regional needs
- Inform the process in a positive, solution-oriented way
- Ensure all work meets our business objectives
- Meets monthly (beginning 2/8); no substitutes for attendance

**Time Commitment**

Committee members will be asked to attend two face-to-face meetings for Phase I (2/8) and Phase II (TBD) presentations as well as monthly one-hour conference calls beginning in March. Monthly updates on the project's development will be provided via electronic memo.

**Appendix G**  
Invitation to Participate in Design Team

**American Cancer Society**  
**Cause Branding and Corporate Cause Partnership**  
**Design Team Charter**

**Team Vision**

Work together as one team to provide relevant and timely input to the development of American Cancer Society's Cause Branding and Corporate Cause Partnership strategy with a goal of helping to establish the Society as a proactive, strategic, and sought-after corporate partner.

**Business Objectives**

Work with Cone to develop aggressive Cause Branding and Corporate Cause Partnership strategy to maximize fundraising, mission delivery and visibility opportunities for the American Cancer Society.

**Team Member Roles/Responsibilities**

Serve as the key responders to recommended approaches for the Society's new Cause Branding and Corporate Cause Partnership Strategy. Provide feedback and insight as to how recommended approaches might advance the Society's income and mission delivery objectives and overcome prior organizational challenges. Serve as ambassadors for the process. Support the development of the platform and strategy so it is best positioned to increase the Society's mission and income delivery across Divisions and the National Home Office.

**Operating Principles**

**Design Team members will:**

- Work collaboratively as one team with a Society-centric approach, meeting both nationwide and regional needs
- Inform the process in a positive, solution-oriented way
- Commit to sharing what you learn/hear with your colleagues in your Division/department
- Ensure all work meets our business objectives
- Meets monthly (beginning 2/11); no substitutes for attendance

**Time Commitment**

Team members will be asked to attend two face-to-face meetings for Phase I (2/12) and Phase II (TBD) presentations as well as monthly one-hour conference calls beginning in March.

**Appendix H**  
Cone PowerPoint Opening Slide for Committee Meetings

## Cone's Assignment



- Develop an enterprise-wide cause marketing strategy that allows National Home Office (NHO) and divisions to assume a leadership position in the cause-related industry
- Analyze current cause marketing practices, procedures, policies and decision filters; recommend revisions that will support the successful implementation of an enterprise-wide strategy

## **Appendix I**

### **Cause-Branding Launch Memo – Terry Music**

#### **A Message from Chief Mission Delivery Officer Terry Music**

May 4, 2010

#### **Join the Society's new Choose You movement!**

Today, the American Cancer Society launches the Choose You movement – our new cause branding prevention platform that encourages women to put their health first and be healthy role models to those around them.

Through tools, tips, and motivation, Choose You empowers women to make healthy lifestyle choices to eat right, be active, get regular health checks, quit smoking, and use sun protection. We know that by taking these steps, women can help prevent about half of cancer deaths!

Here's how you can get involved:

- [Watch today's national Choose You launch event](#) live from Times Square in New York City at 9:30 a.m. ET (or watch the replay on The Link) and hear from Society leaders; our sponsors, Walgreens and Sprite Zero; and our celebrity spokesperson, *Grey's Anatomy* star Ellen Pompeo.
- Visit [ChooseYou.com](#) and sign a Choose You commitment to help you reach your personal health goals.
- Read the Choose You blog on [ChooseYou.com](#) to follow the journeys of real women who have committed to put their health first.
- Follow [Choose You on Twitter](#) to receive news, tools, and tips from experts on making healthy lifestyle choices.
- Join the [Choose You Facebook fan page](#) for a community of support.
- [Watch this video](#) to see how American Cancer Society staff members are taking steps to choose themselves to stay well and help prevent cancer.
- Learn more about the Choose You movement by visiting the [Choose You page](#) on The Link.



## **Appendix J**

### **Cause-Branding Decision Making Process**

#### **ACS Cause Branding Decision-Making Process**

##### **Background**

Many of the existing policies and procedures for managing Cause Branding decisions at ACS were creating unnecessary roadblocks to simple and successful engagement with corporate sponsors. To address these challenges, we did two things:

- Reviewed existing policies and adjusted them to reflect a more contemporary approach to sponsorship.
- Considered all internal Cause Branding stakeholders at ACS and created a decision-making process that engages each team and allows for a quick and simple process for bringing sponsors on board.

##### **Consistent Policies and Protocols Across the Enterprise**

The following shifts in policy were reviewed by the members of the Cause Branding Steering Committee and ratified on February 23, 2009.

<b>Today</b>	<b>Tomorrow</b>
Concern around corporate partnerships compromising ACS Science integrity.	Corporate Communications will operationalize firewall policy to ensure separation of Business and Science.
ACS does not extensively promote corporate sponsors.	ACS will promote corporate sponsor support through various media and marketing materials (press release quotes, logo on Web, etc.)
ACS avoids deals that require UBIT.	Payment of UBIT is not a roadblock to cause commerce or sponsorship; ACS will pay it when necessary.
Cause Branding dollars have been reported through various channels (NHO and Divisions) and not in total.	Process developed to enable cumulative reporting of cause branding revenue (NHO and Divisions).

Fair and sufficient value has been determined differently from deal to deal and by a variety of stakeholders.	The CB Steering Committee has determined fair and sufficient value. It may evolve with market conditions (no minimums).
No existing food certification program.	Consider food certification program in light of market conditions now that Ingestible standards are finalized.
Limited exclusivity in marketing deals.	All entities need to be mindful of nationwide exclusivity when pitching local/regional sponsorship.
Disclaimer language used at all levels of sponsorship.	Limited legal need for disclaimer language on promotional materials for National and Element sponsors.
Interstitial Web page required when linking to sponsor Web sites.	Interstitial page no longer required. Legal disclaimer language will be added to Cancer.org to protect ACS.
Monitoring report includes cause marketing “criteria.”	Monitoring Report Appendix B added by staff will cease to exist.
Cause Branding sponsorship contract approvals follow the expense approval process.	New contract approval process designed and approved by Steering Committee for revenue contracts.
Use of PAF	Cause Branding Review Team
EL II.11 applies to NHO for Cause Branding.	Compliance with EL II.11 also applies to all entities, based on current Division licensing agreement.

### **Cause Branding Sponsorship Decision-Making Process**

To ensure that the decision-making process for all Cause Branding sponsors is seamless and consistently applied, a new Cause Branding Review Team was created. The team’s responsibilities are outlined below.

#### ***Cause Branding Review Team***

##### **Who:**

- Cause Branding Alliances team and one representative each from Business Practices, Corporate Communications, Finance and Legal.

##### **What:**

- Body of key Cause Branding stakeholders who develop recommendations on potential Cause Branding sponsor agreements.

**Responsibilities:**

- Review all potential sponsors, considering financial and “risk to brand” information provided by CBA and Corporate Communications teams.
- Provide recommendations on individual sponsorship deals to decision-makers for Element and Nationwide Presenting sponsors.
- Coordinate with stakeholders to evaluate targets for risk to brand and firewall check.

**Process role:**

- A bi-weekly CBRT meeting will be held to review pending opportunities and challenges. **Executive leadership will join monthly at first.**

**Sample Agenda:**

- Review proactive and reactive prospect list, review and discuss results of impact to brand work, review prospect deal terms, consensus on final deal terms sheet, present potential sponsors to decision makers for processing.
- Engage with existing EI account service model to maximize relationship opportunities.
- Cause Branding platforms are included in overall account planning.
- Requires transparent and seamless sales and account management.

**Coordination with Employer Initiative and Corporate Communications*****Employer Initiative***

The Cause Branding sponsorship sales and account management process will differ depending on the target sponsor and their relevance to EI. In certain cases, potential Cause Branding sponsors will also be EI priority companies. The Powerpoint deck accompanying this document outlines in detail how these relationships will be coordinated when companies are targets of both Cause Branding and EI.

***Corporate Communications***

For each potential sponsor, ACS Corporate Communications will have the responsibilities of evaluating the sponsor’s risk to the ACS brand, managing any conflicts of interest with the Science side of ACS, and helping to promote the sponsor’s investment in ACS.

As a member of the Cause Branding review team, the Corporate Communications representative will bring a media scan detailing recent coverage of each potential sponsor and related analysis. Once partners are brought on board, a communications plan specific to that partner will be created by a member of the Cause Branding Alliances, then reviewed, approved and supported by the Corporate Communications team.

### **Decision-Making Structure and Responsibilities**

#### ***Presenting Sponsors:***

- Executive Leadership Consensus: Based on recommendation by CBRT. Chief Mission Officer, NVP of Marketing, Chief Development Officer, NVP of Corporate Communications and CFO.

#### ***Element Sponsors:***

- Consensus: NVP of Marketing, Chief Development Officer, NVP of Corporate Communications, based on recommendation by CBRT.

#### ***Cause Marketing:***

- Decision: Director of Cause Branding Alliances.
- Advised by CBRT: Directors from Corporate Communications, Business Practices, Legal, NVP Finance and relevant Division representative. Irresolvable concerns on risk to brand default to Marketing/Corporate Communications NVPs.

#### ***Division Sponsors of Platform Elements or Cause Marketing:***

- Consensus: NVP of Marketing, Chief Development Officer, NVP of Corporate Communications, Division CEO.

#### ***Consumer Revenue:***

- Decision: Director of Cause Branding Alliances, advised by CBRT.

#### ***Division Element Sponsor:***

- Consensus: NVP of Marketing, Chief Development Officer, NVP of Corporate Communications, Division CEO.

#### ***Division Cause Marketing Sponsor:***

- Consensus: CBRT and Division CEO or their representative.

## **Appendix K**

### **Cause-Branding Sponsorship Standards**

April 14, 2009

#### **ACS Cause Branding Sponsorship Standards Background**

A series of meetings were held with select members of the Cause Branding Steering Committee, ACS Science representatives and Division CEOs to assist in developing sponsorship standards for ACS Cause Branding. The purpose of these meetings was to establish alignment on specific categories and industries that are allowed to remain IN or eligible for Cause Branding sponsorship and those (if any) that are ruled OUT or ineligible, based on the methods outlined below. We undertook this effort to:

1. Ensure enterprise-wide agreement, from Science and lay leadership, before implementing Cause Branding strategy
2. Provide clear science-based guidelines around corporate sponsorship to ensure consistent decision-making on an enterprise-wide basis

The following set of guidelines and filters were determined to frame the decision-making process for each category of sponsors: First, guiding principles were established to ensure a consistent approach for stakeholders with respect to decision-making. Second, OUT filters were put in place to clarify areas that would exclude a company from becoming a sponsor. Third, three key risk factors were identified in order to determine a potential sponsor's risk to the ACS brand. Each category of potential sponsors was evaluated based on these guidelines and filters, allowing the committee to make an IN or OUT decision.

#### **Guiding Principles**

The following principles were agreed to and reviewed at the outset of each meeting:

- Evidence-based science (EBS) is the first and most important criteria for evaluating whether a category, product or service remains in, or is excluded from cause consideration
- Absent EBS, common sense prevails.  
Moderation is the proxy for common sense. For example, for those products that are eaten/applied/done in moderation and for which there is a suspected scientific-based risk or link to cancer, those that are suspected to high risk will be excluded from ACS cause branding and marketing. Those that are judged to be of either low or moderate risk maybe included in cause

branding or marketing programs provided they satisfactorily meet other criteria as noted in detail, later in this document.

- We agreed to shift the collective ACS mindset regarding corporate sponsorship from “too risky” a proposition to a “business imperative”

## **OUT Filters**

The group agreed to three OUT Filters. Products are excluded, and therefore prohibited, from ACS Cause Branding if they meet any of the following criteria:

1. If evidence-based science states that there is high suspected risk of cancer when the product is used (consumed, applied, etc.) in moderation. A product is considered high risk if:
  - o Product is classified Group 1 or 2A by the International Agency for Research on Cancer (IARC) as carcinogenic or probably carcinogenic to humans.
  - o Food product is a driver of obesity based on kcals/100g, according to the World Cancer Research Fund’s energy-density threshold of 275kcals/100g
2. Tobacco/alcohol products are prohibited
3. Companies who are known to be approaching or potentially in a state of insolvency are prohibited.

## **Risk to Brand Filter**

The group agreed that Risk to the ACS Brand must also be considered when determining potential cause sponsors or supporters. The three criteria to be considered when evaluating risk to the brand include:

1. Suspected link to cancer as defined and determined above
2. Risk of bad publicity (determined by assessing and considering the source of the potential publicity, its impact, and determining if it’s defensible when evidence-based science is unclear, and common sense is used instead)
3. Values determined to be inconsistent with those of ACS. Examples where values are considered inconsistent with ACS are companies with known issues and reputation for Poor Labor & Customer Relations (discrimination), Questionable Product Sourcing (child labor, for example), Non-Compliant with the law

**Process/Attendees Meeting    Date**

**Attendees**

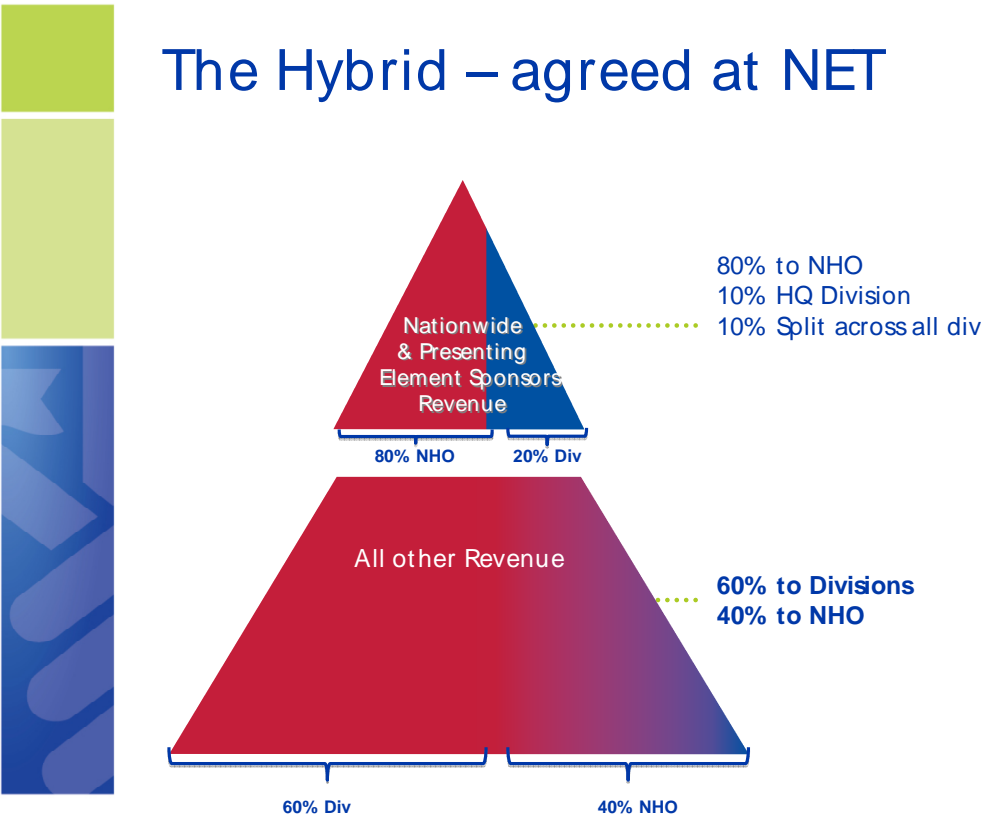
Affirmation of ACS decision criteria, guiding principles and OUT filters	10/10/2008	Senior Leadership Team
NET affirmation of ACS decision criteria, guiding principles and OUT filters	10/16/2008	Nationwide Executive Team
Overview of decision criteria, guiding principles and OUT filters with subject matter experts	10/23/2008	Scott Bennett, Greg Bontrager, Otis Brawley, Flo Bryan, Don Distasio, Greg Donaldson, Colleen Doyle, Guy Fischer, Ted Gansler, Roshini George, Sheffield Hale, Terry Music, Dearell Niemeyer, Nicole Pierce , Joanne Pike, Ken Poitier, Gail Richman, Michael Thun and Nancy Yaw
General Standards Meeting	10/27/2008	Scott Bennett, Greg Bontrager, Otis Brawley, Flo Bryan, Don Distasio, Greg Donaldson, Guy Fischer and Terry Music
Additional meetings to review decision criteria, guiding principles and OUT filters	10/28/2008	Flo Bryan, Steve Derks and Gary Reedy
Healthcare Standards Meeting	11/3/2008	Scott Bennett, Otis Brawley, Flo Bryan, Greg Donaldson, Guy Fischer, Ted Gansler, Len Lichtenfeld, Terry Music, Joanne Pike, Gary Reedy and Nancy Yaw
CPG: Ingestible Standards Meeting One	11/13/2008	Scott Bennett, Greg Bontrager, Otis Brawley, Flo Bryan, Don Distasio, Greg Donaldson, Guy Fischer, Terry Music, Joanne Pike, Ken Poitier, Gary Reedy, Michael Thun and Nancy Yaw
CPG: Non-Ingestible Standards Meeting	12/16/2008	Scott Bennett, Otis Brawley, Flo Bryan, Don

CPG: Ingestible Standards      1/23/2009  
Meeting Two

Distasio, Greg Donaldson,  
Guy Fischer, Ted Gansler,  
Terry Music, Dearell  
Niemeyer, Joanne Pike,  
Ken Poitier and Michael  
Thun  
Scott Bennett, Otis  
Brawley, Flo Bryan, Greg  
Donaldson, Colleen  
Doyle, Guy Fischer, Ted  
Gansler, Terry Music,  
Joanne Pike and Michael  
Thun.



Appendix L  
Cause Branding Revenue Share Model



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