

PORTLAND HOTEL SOCIETY VANCOUVER, CANADA

STRATEGY DESIGN COLLABORATION FORUM

WHO

Portland Hotel Society used Ethelo to engage its staff in a collaborative process for strategy design

GOALS

To prioritize strategic initiatives while overcoming resistance to change by staff members given the sudden replacement of the executive team

HOW

Ethelo collected votes and comments in a seamless forum designed to blend the will of the staff with operational time-constraints

OUTCOME

A process that bred confidence and support in the staff, while providing a clear indication of the best-supported initiatives

Following significant changes to the organization's top management, Vancouver's Portland Hotel Society recognized that a highly participatory approach to strategic decisions was needed. By streamlining the engagement of over 90 staff spread across multiple locations, Ethelo allowed the team of directors to unlock, analyze, and shortlist initiatives across 5 strategic areas. In addition to the engaging experience for staff members, the time savings were conducive to an immediate payback.

BACKGROUND & APPROACH

THE PHS IS ONE OF VANCOUVER'S LARGEST SERVICE PROVIDERS FOR DISADVANTAGED POPULATIONS

It is famous for having created and overseen Canada's first Safe Injection Site, "Insite", and was a pioneer in many areas of health outreach to marginalized populations.

Despite its laudable achievements, however, financial irregularities forced the PHS to bring in an entirely new management team and board of directors. Having gone through such significant change, the new interim Executive Director recognized the need for a highly participatory approach to upcoming strategic decisions. The intention was to engage both directors and staff in coming to a shared vision for the future of the organization.

The Challenge

To its credit, the former PHS management was dynamic and highly innovative and had inspired a passionate and dedicated staff. The newly hired

executive team brought a more stable but bureaucratic approach, which set the stage for a clash of cultures between the new leadership and the approximately 400 staff.

Portland Hotel Society needed a fresh start, and a way of managing change that would create the unity and buy-in necessary to compensate for the antipathy created around the sudden transition in management.

The difficulties of ensuring the engagement of over 400 staff members was compounded by the fact that employees were spread across multiple locations and involved in many and varied programs. Of concern, also, was that some staff members were more vocal than others. In-person meetings would not necessarily be conducive to everyone's input being considered equally. The process could lead to a "group-think" with difficulties in implementation success down the road.

The PHS chose to use Ethelo to create an open, interactive forum for strategy design.

“*Taking the first step in strategy development for us was about connecting to the shared wisdom of the many capable and innovative people in the organization, We felt that limitations in our ability to engage would directly hamper our ability to craft the strategic possibilities for our organization.*”

Eamonn O'Laocha, the PHS Interim Executive Director

APPROACH

THE PROJECT CALLED FOR STAFF AND BOARD INPUT INTO 5 CORE AREAS REQUIRING STRATEGIC ATTENTION

Staff-Driven Ideation

A focus group of staff was held to collect ideas that were used to “seed” the Ethelo platform. Those ideas were vetted by the Executive and distilled down to the first set of 12 potential initiatives, covering 5 strategic areas. For instance, the core area, “Advocacy”, could be addressed by one or more different initiatives including (a) hiring an outreach worker, (b) creating partnerships; (c) research the business case for a street market.

Each of the 12 potential initiatives was uploaded to the Ethelo platform to be rated and commented upon. However, in order to capture ideas not previously identified during the original focus group session, Ethelo was configured to allow the staff to add more suggestions afterwards. The PHS executive reviewed these suggestions and those that were seen as actionable were “approved” which cued them for general evaluation by all staff as “options”. For example, one suggestion that graduated to become an option was to hire an aboriginal outreach worker (Fig. 1).



Figure 1. Suggestion panel for staff suggestions. In this case, one suggestion was approved by management (becoming initiative #3, above)

Management-Driven Constraints

Although staff input drove the identification of potential initiatives, the PHS executive played an oversight role to ensure ideas were actionable given the resources of the organization. This happened on an idea-by-idea basis, but also globally. To this end, each idea was evaluated in terms of its resource requirements, and Ethelo was configured to ensure that any final strategic plans obeyed a set of management-defined constraints.

- Effort Units - the intensity of work required to realise each particular initiative
- Time to Accomplish - how long it will take for the strategic option to be completed
- Funding Mode - funded through donations and/or partner based funded through grants
- Stand Alone or Partnered - indicating the where there is a need for partners

This information was made available to the staff, in order to assist each member in choosing the initiatives of their preference (Fig. 2)



Rating and social dialogue box, outlining relevant information and staff-effort trade-offs

Results

Collaborative Engagement

Of the 435 PHS staff members invited to participate in the strategic evaluation, 88 voted adding meaningful commentary in Ethelo's platform. This accounted for an overall participation rate of 20%, with participants voting on an average of 3 out of 4 initiatives (73%). A total of 12 additional suggestions were put forward by staff; and an average of 6.7 comments were collected for each of the 13 initiatives.

Most importantly, the overall experience went beyond the typical one-way survey process. Eamonn O'Laocha, the PHS Interim Executive Director, commented:

"Not being fully inclusive can be detrimental. But using Ethelo allowed us to overcome the limitations that come with engaging the organization's staff in a collaborative, manageable and timely manner. This allowed us to identify a relevant and congruent strategic direction for the organization...."

Optimizing for support and viability

Given limited organizational resources, PHS needed to ensure that whatever scenarios Ethelo proposed would be actually feasible. Management had made an estimate of the required "effort" level for each initiative (Fig. 2), and Ethelo used this information to ensure that all potential strategic plans fell within a maximum of 30 'effort units'.

Applying the "effort" constraint allowed Ethelo to reduce the number of viable plan scenarios from

more than 8,000 to 3,689, which it then ranked in order of staff support.

Transparent, Actionable and Popular Results

Ethelo allowed each staff person to see the results being generated in real-time, as they participated on the platform. When the consultation was completed, Ethelo had shortlisted the list of potential initiatives down to an optimal mix of 9 initiatives. Ethelo showed that this 9-initiative combination would lead to a high degree of organizational support (88%), while at the same time falling within the budget of 30 units of effort (Fig. 3).

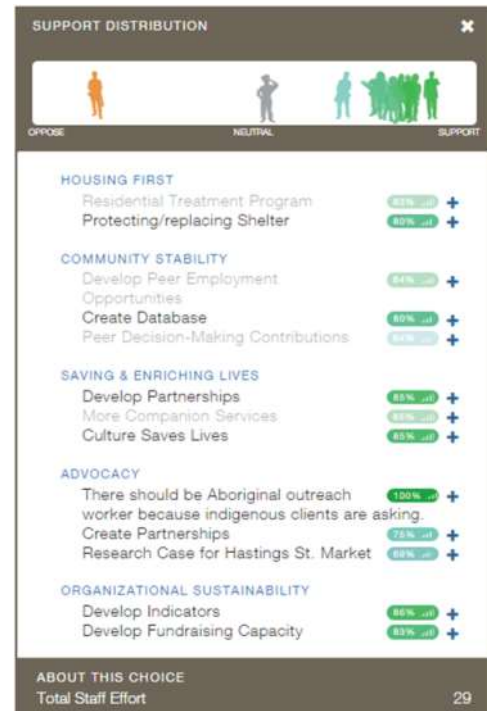


Figure 3. Results panel, displaying the selected initiatives totalling less than 30 staff 'effort units', while maximizing staff support

Estimated time & cost savings

The platform brought two major efficiency gains. On the one hand Ethelo saved an estimated 4 hours of total staff voting time compared to standard online surveys. These time savings came from the platform's ease of navigation, and its integrated commentary boxes where staff could cross-validate each other's insights. Bringing together 88 staff members into focus groups or collaborative documents would have been more impractical.

In addition, Ethelo's enabled significant time savings by reducing the effort required by management to analyze participant inputs, shortlist initiatives staying within 'effort unit' budget, and then identify actionable, unifying decisions.

The seamless analysis led to an additional 22 hours of estimated time savings. The payback was immediate and also presented a 35% cost efficiency over other methods.

"...we did immediately implement one of the Ethelo recommendations that surfaced and was then validated by staff. The platform was key in allowing the entire team to engage in issues of strategic importance."

Using Ethelo allowed us to overcome limitations in engaging the organization's staff in a collaborative, manageable and timely manner. This allowed us to identify a relevant and congruent strategic direction for the organization.

Eamonn O'Laocha, Interim Executive Director

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