

# STRATEGY DESIGN COLLABORATION FORUM

# PORTLAND HOTEL SOCIETY

## WHO

Portland Hotel Society, one of Vancouver's largest social service providers

## WHAT

Collective approach to strategy design

## NEED

Participatory approach to new strategy design

## OUTCOME

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35% cost savings in identifying actionable, 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 94 staff spread across multiple locations, Ethelo allowed the team of directors to unlock valuable insights needed for better results across 5 strategic areas.

## APPROACH & RESULTS

# TRANSPARENT AND UNIFYING SHORTLISTING OF 9 STRATEGIC INITIATIVES

Despite its laudable achievements as one of Vancouver's largest service providers for disadvantaged populations, financial irregularities forced the Portland Hotel Society to bring in an entirely new management team and board of directors.

The newly hired executive team brought a more stable but bureaucratic approach. But this set the stage for a clash of cultures between the new leadership and the approximately 400 staff. The need for dialogue and inclusion became evident. However, 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.

This led the new interim executive director to use Ethelo to foster a participatory approach to upcoming strategic decisions. After collecting staff input for identifying potential initiatives, the PHS executive played an oversight role to ensure ideas were actionable given organizational resources.

Ethelo was configured to guarantee that the outcomes would stay within a set of management-defined constraints. With the estimate of the required "effort" level for implementing each strategic initiative, Ethelo ensured that all potential strategic plans fell within a maximum of 30 "effort units". Applying this "effort" constraint allowed the platform to reduce the number of viable plan scenarios from more than 8,000 to 3689 (which it then ranked in order of staff support).

When the consultation ended, Ethelo shortlisted the list of 13 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 staff support (88%), while at the same time falling within the budget of 30 units of effort.

Ethelo's platform enabled significant time savings by reducing the effort required by management to analyze participant inputs, shortlist initiatives staying within the "effort units" budget, and then identify actionable, unifying decisions. The seamless analysis of ratings and commentary led to 22 hours of estimated time savings. The payback was immediate and also presented a 35% cost efficiency over other methods.

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*Using Ethelo allowed the PHS 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.*

Eamon O'Laoha, PHS Interim Executive Director

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