



**Abinader**  
group

## Engaging Staff in the Strategic Planning Process

So today is the day you unveil the new five-year strategic plan to agency staff. You're proud of and energized by the board or management planning effort and are sure the staff will be pleased with the results. However, by the mid point in your presentation staff becomes less and less responsive or engaged. You wonder how this leadership effort, excitement and action became translated into an apathetic or frustrated response from staff members.

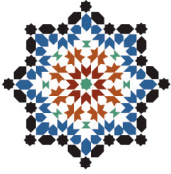
### **Participatory Process instead of Leadership Mandate**

Staff members want to have input about decisions that affect their work. By not including them in the planning process you send the message that their perspective is not needed or valued. If staff is informed of changes, goals and program restructuring as non-negotiable announcements there is often concern about the intention and implementation of such decisions.

### **Collaborative Effort, Pathway for Change**

Since many strategic planning efforts are already faced with time limits, fluctuating resources and looming mandates clients are reluctant to consider a collaborative process. Clients are often concerned that including staff in decision-making will drag out the timeline and build resentment for requesting time away from current responsibilities. Some clients argue that Executive Leadership and the Agency Board are ultimately responsible for setting program vision and direction while staff members are responsible for carrying out their plan.

I believe however, that engaging the Staff, Leadership, and Board in the planning process produces the most successful outcomes. Engaging the Staff, Leadership and Board creates ownership and support when implementing changes at all levels of the organization. Involving staff also gives leadership helpful and practical considerations when responding to agency needs and external factors. Staff will feel acknowledged, valued and confident in the strategic plan and leadership will feel supported in making decisions and directing agency change.



## Inviting an Engaged Response

Engaging your staff and leadership in a collaborative process does not mean that everyone is involved in numerous meetings to hash out every decision. Instead consider implementing some of these strategies as you embark on a strategic planning effort.

- Generate enthusiasm for the planning process—announce the planning effort at an all-staff meeting, share why it’s important, and what you hope to accomplish.
- Establish a Planning team that includes staff representatives. Invite and gather staff input to inform strategic efforts.
  - Ask each team, unit, or division to identify one staff member to represent them on the Planning Team—this person will solicit group input, represent group concerns or ideas and report back on the Planning Team’s progress.
- Provide clear and direct communication about the process. Discuss non-negotiable parameters and emphasize places the Planning Team can have an impact.
- Articulate the internal structural changes you are considering. Transparent communication helps your staff understand and accept why these changes are needed. Sharing information helps to minimize negative reactions from staff who might otherwise learn about program restructuring through the grapevine. Staff members need time to adjust and decide if changes will work for them.
- Highlight planning efforts at every staff meeting and/or through you internal bulletin board. Share drafts of the Strategic Plan and invite staff to provide comments.
- Conduct a web-based survey to elicit all staff input
- Invite managers and staff to present their “on the ground” perspectives of client needs, program realities, and future challenges at Planning Team meetings.
- Emphasize short-term achievements.

## Celebrate Group Success

With increased collaboration both staff and leadership are more likely to complete a practical, satisfying, and action oriented strategic plan. Opening up a participatory process to staff may increase initial planning time. However, valuing, acknowledging and respecting the multiple ideas and voices that went into the strategic planning will result in a broadly supported path for organizational change.