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### Ways to make your strategy process more inclusive

1. Invite staff to contribute to the strategy process as early as possible in the cycle. In this way you get access to useful (diverse) perspectives from different levels in the organisation. People will also sense that they can help shape the strategic direction.
2. Design a process that allows people to draw on and add to one another's ideas. Although they are easier to organise, 'talking head presentations' will not achieve this! It's easy to involve multiple groups in the process.
3. Keep your first round of strategy discussions at a very high level. This will prevent ideas becoming bogged down (or lost) in detail and may also overcome common concerns about disclosing commercially sensitive data at an inopportune time.
4. Leave stripes at the door! Having people from different levels of the organisation interact frankly can generate incredible strategic value. However, this can only be realised if people park their rank at the door. Good ideas can come from anyone, and everyone should feel encouraged to share their ideas and opinions frankly.

## WHAT CAN YOU LEARN FROM ELIZABETH GROVE?

### *The Vision Building Day*

Recently, UGM supported an organisation with its Vision Building Day. Around 60 people gathered in a very large room on the premises for a day-long strategy planning session. The aim, to build a shared vision for the organisation for at least the next 3 years. This day, a key piece in broader renewal program led by an enthusiastic, energetic and committed leadership team.

As the start time drew closer, places at the tables started filling. It provided a perfect opportunity to gauge the mood and, as important, expectations for the day. Overall people were very positive about the event, despite being more than a little curious about how it might unfold. It was, after all, a large chunk of time to invest. A perfectly understandable and pretty standard response.

By the end of a very full day of deliberations and decision making, the group was justifiably extremely pleased with the comprehensive outputs they had generated. Despite their rigorous cognitive workout, individuals seemed even more energised by day's end than when they arrived. A sure sign, the fantastic community spirit shown during the venue clean-up. In literally a few minutes it was impossible to know that the big event had even taken place – posters that covered the walls, table and chairs and left-over catering, all gone!

### *Living their Values*

Anyone who has organised a strategy event will acknowledge the apparent success of the event. Those in the know are even likely to admire the fact that a large group of 60 people engaged enthusiastically in a strategy development exercise for a whole day! Importantly, they weren't just listening to 'talking heads' and plenary 'presentations'. Other than outlining the purpose of the day and how it would work, there were none of those, all day.

Here are a few facts that we know many will find remarkable. The organisation is Elizabeth Grove Primary School (Elizabeth Grove), located in one of Adelaide's most socio-economically challenged suburbs. Just a stone's throw away and employer of many in the community, the embattled Holden motor plant.

Elizabeth Grove's three Values of honesty, respect and (sense of) community are not just for slick posters on the walls. They're lived Values and were evident throughout the strategy day. The day itself came about to allow the broader community to contribute to the school's plans for the next few years. Participants on the day included all school staff, student representatives, parents, other community partners and educational authorities.

Conversations during the day were honest, yet also respectful and focused on the task at hand. Standing a little distance from any table group, it was difficult to tell who were staff, who were parents, who came from other local partner organisations and who were the education authorities. It was pretty obvious though that people felt included and responded by giving the process their all. Among these, the student representatives (aged between 9 and 12) whose contribution to the day was outstanding.

### *Key success factors*

What are some of the essential elements that made the Vision Building Day so successful? The standout feature was the commitment to, and implementation of, a truly inclusive process. A wide range of individuals confirmed, both during and after the event, that they felt genuinely included and sincerely listened to. This built an incredibly powerful, self-reinforcing cycle of contributing and belonging. People's contributions were respected and valued, so they gave even more.

Second, the very high quality of the strategic output was undoubtedly enhanced by the great diversity of perspectives presented during discussions. This was achieved by including different stakeholders, all of whom play some role in the Elizabeth Grove 'system'. This is also an excellent way of ensuring scarce community resources are optimised through different stakeholder groups sharing common understanding and goals.

Another key element was the willingness of principal Dan Jarrad and his leadership team to take a few calculated risks. Is throwing open such an important management accountability a responsible thing for a leadership team to do? How would people respond to strategic planning since many had never done anything similar before? What would be the impact of inviting stakeholders, beyond the school staff, to be involved in hearing and sharing frank information about the school and its future? In the end, their courageous leadership vindicated by great outcomes.

### *Postscript*

In the couple of weeks since its Vision Building Day, Elizabeth Grove Primary School is making good progress with follow up. In the near future workshops are scheduled to share outcomes with students and parents who didn't attend. It may not surprise you to learn that the student representatives have been invited to play a leading role in these workshops.

Sadly, Holden is in the news. SA Premier Jay Weatherill indicated that a closure of the plant is looming as a reality. One can't help but wonder whether, over the longer term, a process with the characteristics of the Elizabeth Grove event might have resulted in a different outcome for Holden.