

COLLABORATIVE STAFF ACTION PLANNING

HOW ETHELO GENERATED OPTIMIZED & COHESIVE ORGANIZATIONAL PLANS

Public Services & Procurement
GOVERNMENT OF CANADA

CONTEXT

The Government of Canada conducts a government-wide Public Service Employee Survey (PSES) every 3 years, engaging staff throughout the public service in giving feedback on their workplace and job satisfaction. These “Pulse Check” type surveys are done through the Office of the Chief Human Resources Office (Treasury Board of Canada Secretariat) in collaborations with Statistics Canada. The data produced is extremely reliable and well segmented. However, it can take a long time for well-structured plans to be formulated to address issues that are identified.

BACKGROUND

The 2014 PSES results for the Pacific region identified a number of persistent problem areas in workplace wellness, including absenteeism that needed to be addressed for each government department. It consisted of 106 questions: 82 covered aspects of the four major themes of employee engagement, leadership, workforce and workplace; the remaining 24 were demographic questions. Questions were added to examine duty to accommodate, types of harassment, and actions taken following experiences of harassment or discrimination. Questions were also added to explore performance management from different perspectives, given the launch of the Directive on Performance Management in April 2014.

The onus for action planning was at both the regional and branch/sector level. Prior to Ethelo’s engagement,

the Pacific Region conducted traditional in-person workshops to explore the problem areas in detail, facilitated by an independent specialist. The 19 sessions resulted in a large list of potential action items, recorded in the actual language used by the staff. The consultant summarized, filtered and curated the long list to a manageable list of 31 potential action items, using Pareto analysis amongst other techniques.

MANAGEMENT PREPARATION

Ethelo collaborated with the management team through a process of defining the consultation parameters and content, in order to present well-defined action items clearly to staff for their inputs and ratings. Each action item was objectively evaluated for feasibility and impact. The purpose of this was to enable Ethelo to identify action plans which had high overall quality and pragmatism. It was decided early on that participation should be anonymous, to maximize contribution.

COLLABORATION OBJECTIVES

Aside from the creation of the action plans, the Pacific Region's senior management saw the need for authentic engagement as a critical factor. The specific objectives were to:

- promote staff buy-in and unity through open, social-media-style dialogue

- integrate new ideas from staff into the final action plans
- demonstrate trust through transparency and the publication of interim results
- encourage information sharing and a stronger understanding about each option
- gain insight into the viability of options

The other critical factor was to be able to demonstrate joint plan ownership between employees and management.

CONSULTATION PREPARATION

Roles and responsibilities were discussed and assigned, including administration and moderation. Ethelo worked with the administrator to configure the solution framework in terms of content and, objective criteria and constraints. Each action item option was accompanied by a description that could be expanded to describe the option and reveal media, links or facts participants may not have been aware of.

Aside from overall feasibility and quality constraints, the list of 31 potential action items needed to have sufficient breadth to meet regional and national objectives. It also had to be realistic, so the total number of options was capped.

The Ethelo algorithm generated all viable action plan scenarios in advance. Each individual would then be able to identify their preferred action plan, in real time, based on their own needs and option evaluations.

THE ONLINE COLLABORATION

Ethelo's platform engaged the staff in the evaluation of the items to shortlist them down to a specific set of actions that would have the greatest impact, feasibility and support given the operating constraints.

Staff participants shared their analysis and commentary about the various options, and learned from each other. Each participant was able to rate each option on a nine-point scale which allowed measurable insight into the level and diversity of support or opposition. They could reply to and like other's comments, as conversational threads emerged. This enabled all options to be thoroughly and transparently discussed and cross-validated.

On an hourly basis, Ethelo aggregated the preferences from all department staff to reach and publish an interim collective evaluation of each viable action plan.

Staff were able return to the Ethelo platform multiple times during the 10-day process to contribute further to the discussion, learn more and adjust their views. The platform updated its aggregated analysis of the current ratings and republished interim results on an hourly basis. This provided staff with the opportunity to look at how the action plan was taking shape throughout, within a highly transparent process.

Only light online moderation was needed during the consultation period despite the potential contentiousness of the topics. The many comments and replies were readily available for all to see alongside the dynamically updated results. Management were able to access reports with more detailed activity and engagement statistics. A single participation reminder was sent out midway through the consultation.

RESULTS

At the end of the process, Ethelo took the ranked results, and performed additional segmentation and contextual analysis.

The results consisted of qualitative and quantitative analysis that combined to provide clear action plans and supporting data.

QUANTITATIVE ANALYSIS

Ethelo's algorithm analyzed over 2 billion (2^{31}) potential combinations of action items, in advance of the online consultation. It applied the pre-agreed criteria developed in conjunction with the management team, for action plan viability (overall benefit, overall feasibility and current activity) and identified just under 7,000 viable scenarios.

Ethelo then analysed the staff evaluations of the individual options, and was able to identify the top action plans from among those 7000. Each staff participant had simply rated the 31 action plan options (with an average completion rate of 87%), and Ethelo did the rest.

These top action plans were not only strongly supported by staff, but also represented the highest levels of staff cohesion. Ethelo's algorithm optimized for solutions with broad as well as high support, which made the final selection for each department quick and easy.

This application of 'strength of support' provides a richer analysis than simple averaging because it minimizes dissent or overall dissatisfaction. This can be seen in the densely clustered distribution of high support on the Group's Support Distribution graphic for the top solution.

Ethelo generated the basic results and data automatically, which was complemented by detailed analysis in a spreadsheet (see Appendix for the structure). This showed 6 core action plan items common to each of the 4 departments, and 3 of the 7 items that had high levels of group energy.



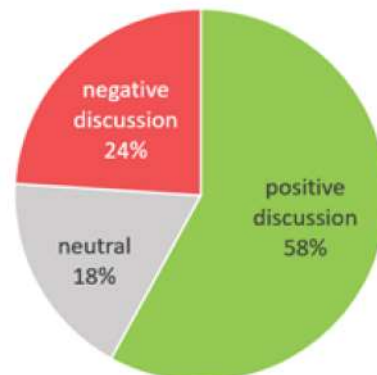
QUALITATIVE ANALYSIS

On average, each participant posted over 7 comments, and over 1000 "likes" were generated. 8% of comments had replies. Almost 60% of all comments attracted likes from other participants, with over 2 likes per comment on average.

The quality of the discussion also proved to be a critical part of the success. Ethelo analyzed the comments and replies for each Action Item to provide management with conversation tone analysis that underpinned many of the ratings.

Even though participation was anonymous, there were no requests for moderator intervention, and the overall tone was positive.

The staff spent an average of 45 minutes on the platform (despite only 20 minutes being necessary). In addition to the 759 comments about the Action Plan options, 28 comments were specifically about the platform and process. Some of these related to how the options were initially created and positioned. A few were open questions or technical comments. The rest were supportive of the overall approach.



AFTER THE CONSULTATION

At the time of writing this paper, the action plans are about to be executed. Furthermore, Ethelo is being presented by internal Government sponsors at a Deputy Minister level meeting in October 2016.

Overall, the process and results was seen as successful in meeting all the agreed objectives. The combination of social media style commenting and liking capabilities promoted high engagement among the staff. Management saw the pairing of this with the algorithm as being unique in the marketplace.

APPENDIX 1

Item	Strength	Comments	Comment tone	Action plans				
				D1	D2	D3	D4	
Priority area A								
Action item candidate 1	78.90%	21	very positive		✓			
Priority area B								
Action item candidate 3	77.40%	22	positive	✓		✓	✓	
Priority area C								
Action item candidate 6	78.60%	16	very positive	✓	✓	✓	✓	core
Action item candidate 8	80.00%	23	very positive	✓		✓	✓	
Priority area D								
Action item candidate 9	82.50%	7	very positive	✓		✓	✓	
Priority area E								
Action item candidate 12	77.10%	27	positive	✓	✓	✓	✓	core
Priority area F								
Action item candidate 13	71.50%	22	very positive	✓	✓	✓	✓	
Action item candidate 15	77.00%	20	neutral		✓	✓		
Action item candidate 18	79.10%	23	positive	✓	✓	✓	✓	core
Action item candidate 20	77.00%	37	positive	✓	✓	✓	✓	core
Action item candidate 23	86.20%	41	negative	✓	✓	✓	✓	core
Action item candidate 24	78.10%	9	neutral		✓			
Action item candidate 31	81.50%	27	positive	✓	✓	✓	✓	core