"Our plan is done, what's next?"
Engaging staff at every level in strategic action based on your values

Background: Since 2004, Root Cause has helped over 400 nonprofits, public agencies, philanthropists, and other funders achieve their goals while advancing racial and economic equity and justice. In 2022, we completed our own strategic plan and have organized the implementation of that plan so that every action item is connected to one of our values. This values alignment and the structure we have put in place to transparently share the strategic action work with all of our staff has kept us focused on what matters most.

Below you will find the **key learnings**, **challenges**, and **actionable next steps** you can take to engage your staff in your strategic action work.

1 Your plan must be driven by **values** that garner your staff's support and attention. When this is true, you have a better chance of operationalizing your values.
- The Root Cause 2022 Strategic Plan is organized by our four values: Purpose, Product, People, and Process.
- These arose from staff discussions during our strategic planning process and all staff were involved in defining them.
- Our goals are organized by value and the projects that help us achieve those goals are too.

PURPOSE	PRODUCT	PEOPLE	PROCESS
We are committed to work that is aligned with our mission and theory of change.	We strive to deliver services, complete projects, and produce deliverables that are of the highest possible quality and meet the needs of our clients and communities.	We know that people are central to our success and their value must be centered in our internal culture and our external collaborations.	We are intentional about how we acquire, integrate, tend to, and utilize our resources— both financial and human—to support Root Cause's long-term sustainability and well-being.

2 You need a **strong internal infrastructure** to support and engage your staff.
- Clearly define roles and responsibilities:
    - **Value Stewards:** Each value has a Steward (our senior leadership team) who oversees the projects under that value. Even if they aren't leading the project, they pay attention to the work of the teams to try to ensure success.
    - **Strategic Project Pods:** Every strategic project has a team, which consists of a project lead (not necessarily the Steward) and project team members who work together to complete the project.

- <u>Increase capacity</u>: In 2022, we hired a Strategic Projects Associate, to manage the implementation of the strategic plan and support staff engagement.This role was additional support for Value Stewards and Strategic Project Pods and managed the high-level timelines for the projects for each value. She also communicated with the rest of the team about progress and solicited their input.
- <u>Develop good processes</u>: Historically, Root Cause has used an online project management software with clients.
  - High-level timelines and workplans were developed within the project management software staff currently use.
  - Project start-up and closeout templates were created specifically for strategic project pods to aid with project purpose setting, debriefing, and capturing key learnings.

3 Your **staff** should be **informed** and asked for **input** about your plan at a regular cadence.
- <u>Monthly status updates</u>: Project leads updated the project status monthly within our project management software for staff to review, comment, and ask questions.
- <u>Leverage staff meetings</u>: Strategic Project Pods share updates and ask for feedback during all team meetings.
- <u>Asynchronous staff feedback</u>: Staff were given the opportunity to provide feedback on deliverables of the strategic projects

Challenges:

- Competing client/external priorities
- Time and capacity constraints
- Sense of urgency (slow progress is still progress)

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Next steps for engaging your staff:

- Uplift and engage staff in discussions around the values that align with your strategic plan.
- Develop an internal infrastructure with clearly defined roles and responsibilities for staff.
- Increase capacity by hiring more staff and/or decreasing staff workloads.
- Leverage and modify current tools and processes to support your staff's engagement.
- Develop a regular cadence for bidirectional communication about strategic work.
- Leverage staff meetings to engage staff in the work.
- Regularly ask for staff feedback and input, synchronously and asynchronously.