



Strategy Refresh

April 2020

Inspiring people and workplaces to thrive

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Engage for Success

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Exec Summary

This Strategy Refresh document is the outcome of a 6-month exercise conducted by a small team of TAG Steering Group members; the team was assigned to research, analyse and evaluate the strategic direction Efs should take going forward. The document below provides the main findings of this exercise; in its conclusion it also offers the team's recommendations for Efs's strategy as we begin our next decade.

Reflection and forward focus by David MacLeod and Nita Clarke (see Appendix 2 for full commentary)

Phase I – the first decade: Main achievements include: securing government mandate, creation of an independent, highly energised volunteer movement, introduction of employee engagement as a key component of business success.

Phase II – the second decade for Efs will focus on: energising key stakeholders to reach beyond maintenance level; encourage our volunteers to continue to stretch beyond maintenance, both with limited Efs resources.

Strategy Refresh Team Recommendations

Strategic direction for the next decade for Efs: To further strengthen the volunteer movement's independent ethos whilst consolidating Efs' undisputed national and worldwide expertise on the topic of employee engagement through:

1. Establishing clear governance to bring the strategy to life, publishing clear roles and responsibilities for Core Team, TAG Steering Group and the Board, who role model Employee Engagement everything they do.
2. Providing clarity of direction for our key stakeholders, further energising the volunteers in the movement.
3. Finalising discussions around the future funding model with appropriate transparency throughout the movement.
4. Increasing strategic partnerships to maximise Efs' reach - with public and private sector organisations - thereby strengthening the voice of Efs and impact of Employee Engagement
5. Designing a flexible structure to enable and support our network of volunteers to maximise their effectiveness.
6. Continuing to deliver an innovative set of enablement tools and resources.
7. Creating and implementing a communication plan to share the refreshed strategy across the movement and beyond.

Objective of the Strategy Refresh

To develop an Engage for Success 2020-2023 Strategy that provides clarity of direction and priorities for stakeholders plus an initial short-term action plan (6 months) based on the refreshed Strategy.

Scope

In scope

- To refresh the existing Engage for Success Strategy with one that builds on what already exists; i.e. **Engage for Success Purpose statement: *Inspiring people and workplaces to thrive*** plus existing strategic documents (published and unpublished).
- To engage key stakeholders in the development of a three-year Strategy to be signed off at 1 April 2020 Engage for Success Board Meeting.
- To develop a six-month action plan, as requested by the Engage for Success Board, also to be signed off in April 2020.

Two key principles were agreed: (1) Less is more. (2) Keep it simple.

Out of scope:

- Finance/ funds and resources as linked to Strategy Refresh - *update provided by TAG Steering Group to be presented to 1 April Board*
- Business model
- Governance
- Roles and responsibilities

Background, context and current environment

As a result of the *Engaging for Success: enhancing performance through employee engagement* report for government by David McLeod and Nita Clarke in July 2009, Engage for Success was established as a movement on 19th March 2011.

Engage for Success is a movement committed to the idea that there is a better way to work, a better to enable personal growth; organisational growth and ultimately growth for Britain by releasing more of the capability and potential of people at work.

Engage for Success want to grow awareness about the power and potential of Employee Engagement. We want to provoke people to think and to learn more about it. And above all we want individuals and organisations to take action, secure in the proof that it works and passionate about its importance.

Source: Engage for Success - Our Purpose, March 2011

The movement has been highly successful in engaging and mobilising volunteers, **inspiring people and workplaces to thrive**. The extent of volunteer groups, activities and publications on the [Engage for Success website](#) is evidence of the success of the movement to date.

The original resourcing model for Engage for Success included Government endorsement and industry-led, corporate sponsorship e.g.

- Running costs (including resourcing)
- Events
- Research

Initial funding at £450,000 is now £41,000 per year. Resourcing included up to eight secondees in the Core Team to provide strategic direction, support for regional groups, systems, content and administrative support. The model since has changed considerably to one where funding now relies solely on an annual contribution from CIPD plus any additional income (e.g. from the annual conferences).

Resourcing now relies on volunteering only, aside from some budgeted tech and admin support to maintain the website and basic comms.

The core team is comprised of volunteers (currently 9) who give their time on an ad hoc basis to support the three hubs (TAGs, Comms and Partnerships). This is co-ordinated by two volunteer Strategy Directors.

The TAG Steering Group also comprises volunteers (currently 11) including the Chair who is also a Board member.

The absence of an MD and the reduction of funded Core Team capacity has resulted in concerns from stakeholders about Engage for Success, its direction, and its future viability as the movement progresses towards its 10-year anniversary.

Yet, employee engagement is still a challenge

Even with the achievement of Engage for Success and the wide acceptance of the 'Four Enablers' (see Figure 1 below) being fundamental to increasing employee engagement, low levels of employee engagement remain a prominent theme and national focus:

- Featuring in the [UK Industrial Strategy](#) (November 2017) and [Good Work](#) (February 2018):
- UK productivity was reported to be 30% lower than USA and 35% lower than Germany in 2018.
- Gallup report that only 11% of the UK workforce is engaged; 21% are actively disengaged; the remaining 68% “*feel no meaningful attachment to their job and their company.*”

The UK's Industrial Strategy set out a long-term plan to boost the productivity and earning power of people throughout the UK by focusing on the five foundations of productivity: Ideas, People, Infrastructure, Business Environment and Places. Good work and developing better jobs for everyone in the British economy is at the heart of our Industrial Strategy vision.

Combined with the new norms emerging from COVID-19, economic uncertainty, continuing poor productivity and growing concern around mental health and wellbeing, employee engagement within the UK has never been so important. Engage for Success has a key role ***inspiring people and workplaces to thrive***. This document outlines a refresh of our strategy to achieve this purpose.

Figure 1: Engage for Success – the Four Enablers



Methodology

Building on the Four Enablers and threading them through everything Engage for Success does, a framework was identified to obtain input from key stakeholders:

The framework utilises:

- Engage for Success' **strategic outcomes**, the 3I's:
 - Inspire
 - Influence
 - Impact

- Along with the three **strategic themes** defined by the Engage for Success Board in November 2019:
 - Health and Wellbeing
 - Good work
 - People Productivity

Given the uncertainty of funding for the movement in 2019, outputs were plotted against a scale of three levels to better enable prioritisation of effort in the short and medium term, along with providing a view of strategic versus tactical actions to build into the 6-month plan. These three levels are:

Maintenance | Growth | Ambitious

Insights

Key topics emerged for all three strategic themes: Health and Wellbeing; Good Work, People Productivity. These are captured in the **strategic framework** to provide guidance on how:

- Engage for Success will support outcomes – see Maintenance
- The volunteer community can contribute to delivery – no matter which level: Maintenance, Growth or Ambitious.

Based on funding and resources available within the volunteer community, it is anticipated that volunteers will be contributing to the 3I's across activities at all three levels of focus i.e. Maintenance | Growth | Ambitious.

Strategy Matrix – a framework of Strategic Outcomes and Themes.

There follows one page for each of the scenarios: Maintenance, Growth and Ambitious.

		Engage for Success Purpose: <i>Inspiring people and workplaces to thrive</i>		
STRATEGIC FRAMEWORK		STRATEGIC OUTCOMES		
		INSPIRE	INFLUENCE	IMPACT
STRATEGIC THEMES Health & Wellbeing, Good Work, People Productivity	Maintenance	<ul style="list-style-type: none"> Engage community with 31's and strategic themes to focus on outcomes. Provide regional and research support and communications. Develop schedule of activities to celebrate Engage for Success 10th birthday on 29th March 2021. Host calendar of events on web page. Regional/Sector Conferences. Recognised as a thought leader. Reignite social media strategy & LinkedIn & Twitter. Publish Strategy Refresh April 2020. Each Steering Group member adopts Thought and Actions Groups (TAG). Position Employee Engagement as key component to high performing teams. Provide 'fact-sheets' & 'how-to' guides to help those new to engagement get started. Gather and share case studies of how organisations increase engagement. Create and share toolkits and webinars. 	<ul style="list-style-type: none"> Work with CIPD nationally and regionally to extend influence. Encourage sector/organisation wide projects. Maintain our existing networks of contacts and speakers. Deliver diagnostic tool as Engage for Success 'product.' Hubs established with volunteers sourced to provide focus on TAGs, Communications and Partnerships. 	<ul style="list-style-type: none"> Develop strategic themes as "Call for Action." Ignite #OneChange to help people and workplaces to thrive. Promote Employee Engagement as business strategy. Publish existing research and evidence of ROI. Publish content with existing data Shine a light on best practice. Publish TAG outputs. Contribute to and publish White Papers. Repurpose existing web content and materials for the 'skim, scroll, scan' internet generation. Create infographic downloads from pre-existing content. Weekly Radio Show/Podcast.
	Success is evident when....	Highly committed volunteers are contributing to our purpose and strategic outcomes, through Thought and Action groups, regional events, hubs, radio show, social media and website and are endorsed/ supported by the Core Team, TAG Steering Group and Board. New initiatives and groups join a thriving movement. Existing partnership working expands to joint events, publications and projects. Products and publications are easily accessed through the website. Our movement continues to raise the profile of Employee Engagement in the UK.		

Engage for Success Purpose:
Inspiring people and workplaces to thrive

STRATEGIC FRAMEWORK		STRATEGIC OUTCOMES		
		INSPIRE	INFLUENCE	IMPACT
STRATEGIC THEMES	Growth	<p>Invest to amplify EfS voice:</p> <ul style="list-style-type: none"> • Annual Engage for Success conference reaches global audience through streaming and sharing. • Younger generations involved in TAG Steering Group/Board/Task Force to grow current and future focus. • Strategic partnerships developed with professional bodies, business and international engagement communities. • Succession plan to introduce new faces for the brand going forward. • Appeal to the younger generation by focusing on purpose and inclusivity topics. • In addition to leaders leading, start to feed growth from bottom up. • Promote requirements and engagement techniques for future workforce. • A campaigning body for the cause of engagement. 	<ul style="list-style-type: none"> • Funding for Executive lead and Core Team. • Strategic, cross-sector Task Force established to engage senior leaders in private and public sector organisations. • Contribute to CIPD strategy. • Expand reach of regional networks and increase number of active volunteers. • Promote requirements and engagement techniques for future workforce. • Be “Go to Experts” for advice and best practice. • Create links and partnerships with Government Agendas and actively seek government endorsement. • Condense and simplify the ‘why’ of engagement for 21st Century audiences (Gen Y & Gen Z). • Ensure the wider EfS community understands how work is changing (the ‘Future of Work’) and what both the challenges and the opportunities are for the engagement community. • Create ‘conversational leadership’ around the changing face of engagement for 21st Century Workforces and post COVID-19. 	<ul style="list-style-type: none"> • Amplify role of employee engagement in response to new norms post COVID-19, economic direction and policy i.e. “Good Work.” • Collaborate with CIPD and other relevant membership bodies. • Amplify link between workplace wellbeing and engagement. • Publish academic research and business case studies to demonstrate impact. • Share how digital platforms extend employee voice and engagement. • Focus on criticality of: <ul style="list-style-type: none"> - World-class, two-way communication, for engagement - Community building and social cohesion for workplace/workforce engagement • Highlight the rise and impact of impermanent (temporary, contract, freelance, gig) workers and work. • Explore engagement in ‘post-conventional’ work landscapes. • Provide guidance on existing methods to understand people productivity metrics.
	Success is evident when....	<p>A Task Force of influential leaders is established to engage their peers in the movement across all sectors, government and economic agendas. Motivated by our purpose, grow our reach demographically, geographically and digitally, our community continues to thrive and expand. Communication, involvement and publications increase across targeted channels. We contribute to strategy, evidencing impact on people productivity and bottom line. We contribute to mainstream media. An Executive Lead and Core Team are financed and a sustainable investment in people, infrastructure and technology is achieved.</p>		

Engage for Success Purpose:
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STRATEGIC FRAMEWORK		STRATEGIC OUTCOMES			
		INSPIRE	INFLUENCE	IMPACT	
STRATEGIC THEMES	Health & Wellbeing, Good Work, People	Ambitious	<ul style="list-style-type: none"> • Recognised globally as an impartial thought leader, a unique place for ideas, sharing best practice, pragmatic guidance, academic analysis and advice for all things relating to employee engagement. • Educate to engage younger audiences via academic partnerships. • Position engagement as critical component of lean, agile, digital transformation, gig economy. • Document link between psychological safety, engagement and workplace wellbeing. 	<ul style="list-style-type: none"> • Leverage networks and technology to achieve global influence. • Permanent representation in policy making. • Engage for Success becomes engagement 'expert in residence' at CIPD. • Narrative has successfully shifted away from 'employee engagement' towards 'workforce engagement' to reflect changing nature of workforce employment constructs. • Become the 'go-to' Public voice on workplace engagement. 	<ul style="list-style-type: none"> • Explore and document how digital technologies can both enhance and hinder workforce engagement and productivity. • Obtain Government mandate to reposition and re-invigorate purpose and outcomes. • Contribute to government policy. • Demonstrate impact on wider community and economy. • Public voice on employee engagement. • Run campaigns.
	Success is evident when....	<p>Engagement frameworks and examples of evidence-based practice are readily available. Providing a case-study of best practice to EfS is perceived as an industry accolade. Entry level workers are joining the workplace with a good understanding of engagement practices and their impact. Multi-sector research demonstrates ROI linked to engagement behaviours and practices. We explore the contribution of Robotic Automation and Artificial Intelligence to increase people productivity. Policy and government mandate reflect our input. Our brand is recognised, and we receive regular requests to provide expertise and thought leadership. Global TAGs exist, collaborating to provide research, publications, events and content. Increase in employee engagement and productivity are reported nationally.</p>			

Authors

Engage for Success Strategy Refresh Team of TAG Steering Group members: [Fiona Anderson](#), [Paul Beesley](#), [Lyda Modiano](#), [Sally Tanner](#) and [Nicholas Wardle](#), who were mandated by the Core Team and TAG Steering Group in October 2019 to complete this exercise.

Our thanks to all those who gifted their time to contribute and provide feedback to this document.

Appendix 1 – Draft Action Plan

The draft action plan below is based on actions/ideas from the Strategy Matrix, split by Maintenance, Growth, Ambitious along with timing, contributors etc.

Category	Activity	Level	Strategic Outcome	Contributors	Sign off	When	Key
EVENTS	Regional events	Maintenance	Inspire	R/H	R/H	Ongoing	Bold Work already happeni
	<i>EFS 10th Birthday planning</i>	<i>Maintenance</i>	<i>Inspire</i>	<i>CT/SG/R</i>	<i>CT</i>	<i>Mar-21</i>	<i>Italics</i> Work not yet started
COMMS	Updated website	Maintenance	Inspire	CT/SG/R/TAG/CT		Ongoing	B = Board, CT = Core Team, SG = Steering Group, TAG = Thought and Action Group, R = Regions, H = Hubs
	TAG outputs published on website	Maintenance	Impact	TAG	CT	Ongoing	
	Coronavirus Comms and related support	Maintenance	Impact	TAG/CT	CT	Ongoing	
	Regular fresh content	Maintenance	Impact	CT/SG/R/TAG/CT		Ongoing	
	Social Media (LinkedIn/Twitter)	Maintenance	Impact	CT/SG	CT	Ongoing	
	Radio Show	Maintenance	Impact	TBC	CT	Ongoing	
	Database of key contacts & speakers	Maintenance	Influence	CT/SG/R/TAG/CT		Ongoing	
	Increase newsletter reach	Maintenance	Inspire	CT/SG/R/TAG/CT		Ongoing	
	#onechange campaign	Maintenance	Impact	CT/SG/R/H	CT	Ongoing	
	Central calendar of all EFS events	Maintenance	Inspire	CT/SG/R/H	CT	Ongoing	
STRATEGIC	Build EFS/CIPD relationship	Maintenance	Influence	CT/SG	CT	Ongoing	
	Attract corporate sponsors	Maintenance	Impact	CT/SG/R/TAG	CT	Ongoing	
	Embed the EFS purpose and themes	Maintenance	Inspire	CT/SG/R/H	CT	Ongoing	
	Sign off EFS strategy	Maintenance	Impact	CT/SG	B	Ongoing	
	EFS & CIPD to agree funding model	Maintenance	Impact	CT/SG	B	Ongoing	
OTHER	Thriving volunteer hubs	Maintenance	Inspire	R/H	SG	Ongoing	
	<i>EFS Diagnostic tool</i>	<i>Maintenance</i>	<i>Influence</i>	<i>TBC</i>	<i>TBC</i>	<i>TBC</i>	
	Expand reach of EFS	Growth	Inspire	CT/SG/R/TAG/H	CT		
	Partner with other professional bodies	Growth	Inspire	CT/SG/R/TAG/H	CT		
	EFS impacts upon CIPD strategy	Growth	Influence	CT/SG	CT		
	EFS becomes 'go to' for engagement best practice	Growth	Influence	CT/SG	CT		
	EFS expands social media offering	Growth	Impact	CT/SG	CT		
	Smarter data analytics	Growth	Impact	CT/SG	CT		
	Target setting for publications: toolkits, webinars (firm r	Growth	Impact	CT/SG	CT		
	Republish relevant TAG materials	Growth	Impact	TAG	CT		
	Run a large-scale national conference (in p/ship?)	Growth	Inspire	CT/SG	CT		
	Salaried core team members	Growth	Impact	CT	B		
	More ambitious website	Growth	Inspire	CT/SG	CT		
	EFS Figurehead required	Growth	Inspire	CT	B		
	More focus upon needs of private sector	Growth	Influence	CT/SG	CT		
	EFS pillars embedded across sectors	Ambitious	Inspire	CT/SG	CT		
	Evidence entry-level workers embrace engagement	Ambitious	Inspire	CT/SG	CT		
	EFS to be invited to advise politicians	Ambitious	Influence	CT/SG	CT		
	EFS to be invited to speak on TV, Podcasts etc	Ambitious	Influence	CT/SG	CT		
	EFS to influence UK and world-wide engagement	Ambitious	Influence	CT/SG	CT		
	Large scale project to link engagement to ROI	Ambitious	Impact	SG/R/TAG	CT		
	Government and major body thinking reflects EFS pillars	Ambitious	Impact	B/CT/SG	CT		
	Increase volume of EFS community	Ambitious	Inspire	CT/SG/R/TAG/H	CT		
	Partner for a large-SGale national event	Ambitious	Impact	CT/SG	CT		
	More TAGs and Regional Groups	Ambitious	Influence	TAG/R/H	SG		

Appendix 2: Reflection and forward focus from David MacLeod and Nita Clarke

Phase 1 – the first 10 years: Energising the movement

In phase 1 of Engage for Success, we set in place the foundations for a movement with the report to government followed by the launch of a task force at number10 supported by the then Prime Minister.

We sought to energise a movement to raise the profile of this vital topic and to shine a light on good practice. Instead of a 'raise and spend' model, we decided to adopt a voluntarist approach, in which *our 'currency' would be people's energy and commitment.*

We achieved much with many and varied Thought and Action Groups (TAGs) bringing together leading practitioners, academics and consultants to explore topics of mutual interest, the conclusions of which were *made available at no cost to the whole movement and beyond.* We established regional TAGs where people from all parts of our economy and in all parts of our country come together to share challenges and approaches to better enable everyone to take forward this topic in their workplaces. The task force guided these activities representing employers of over 1 million people in the UK. We were supported by 60 of the most senior CEOs who contributed time, effort and resource. This included 30 secondees from over 20 organisations, the building and branding of a website which is now the first non-paid for Google search response to 'employee engagement'. The website currently receives 20 to 30,000 hits every month and has attracted over 4 million-page views. The weekly radio show is in its 339th plus edition. The value of organisations' and individual people's contributions equates to millions of pounds.

“One of the most impactful reports the government ever commissioned”, Russell Grossman, Director of Communications at Office of Rail and Road (ORR)

We have raised the profile of this topic and the government's productivity initiative has, *'productivity through people' at its heart.* Matthew Taylor, CEO of the RSA, acknowledged our work and insights as an important inspiration for his Good Work initiative.

Employee engagement is now widely acknowledged at the most senior leadership levels throughout the UK, as central to organisational success; from small private sector organisations to multinationals, from the public sector including hospitals, police and schools through to local authorities and the not-for-profit sectors; they all have inspiring case studies to share and learn from.

Engage for Success fully acknowledges that these initiatives have occurred as a result of widespread and deep-seated commitment by a huge range of people and organisations in all sectors of the economy and we in Engage for Success are delighted to have put our shoulder to the same wheel.

One of the most senior and successful HRDs in the country wrote of Engage for Success' engagement:

A role model approach..... being achieved on a totally voluntary basis to date without bureaucracy-weighty financial commitment or ego....EFS has developed a clear purpose and tangible outputs taking insights from the research that led to the four enablers, building from this platform in an inclusive, practical and accessible way.”

Phase 2 – forward focus, the second decade: People lead the movement

Our approach will be much less about inspiring and energising a movement *from the centre* and much more about a *widespread people-led movement*, with individuals who kick-off events in cities and towns together with people who have the curiosity and the desire to learn and explore together relevant aspects of our topic. It is the time to let 1000 flowers bloom, rather than to energise the movement from the centre.

There is no HQ for Engage for Success, we avoid a corporatist approach. We have a small part-time core group and an advisory board. This ensures we adhere to our ethos and voluntarist approach while we accept a minimum number of guidelines e.g. the use of our branding, our charity status therefore offering all our conclusions and insights free of any charge other than occasionally asking for small contributions to administrative expenses. We have a process to quality control the output of topic TAGs with a Steering Group of peers. We are delighted to be legally cited within CIPD and to benefit from their support - Efs supports CIPD in that we seek the same thing but from a multifunctional approach and CIPD supports Engage for Success with resource and the chairmanship of our board by Peter Cheese, CEO of CIPD.

In phase 2, the concentration of our collective effort is on ensuring that we share successes and experiences, challenges and opportunities for the benefit of everyone. We expect people to 'own' the inputs and outputs, rather than seek resource from the centre. However, in order to facilitate this collective effort, we will seek to have more collective conference calls, more webinars, more sharing of experiences and energies. We rely on volunteers to take ownership of running these regional and topic TAGs and to contribute to the three leadership hubs which focus on ensuring open and easy **communications** through social media, working in **partnership** with other organisations, and **overviewing the work of our TAGs**. Volunteers of these three hubs help to share the load with an incredibly effective part-time voluntary team who deserve more support!

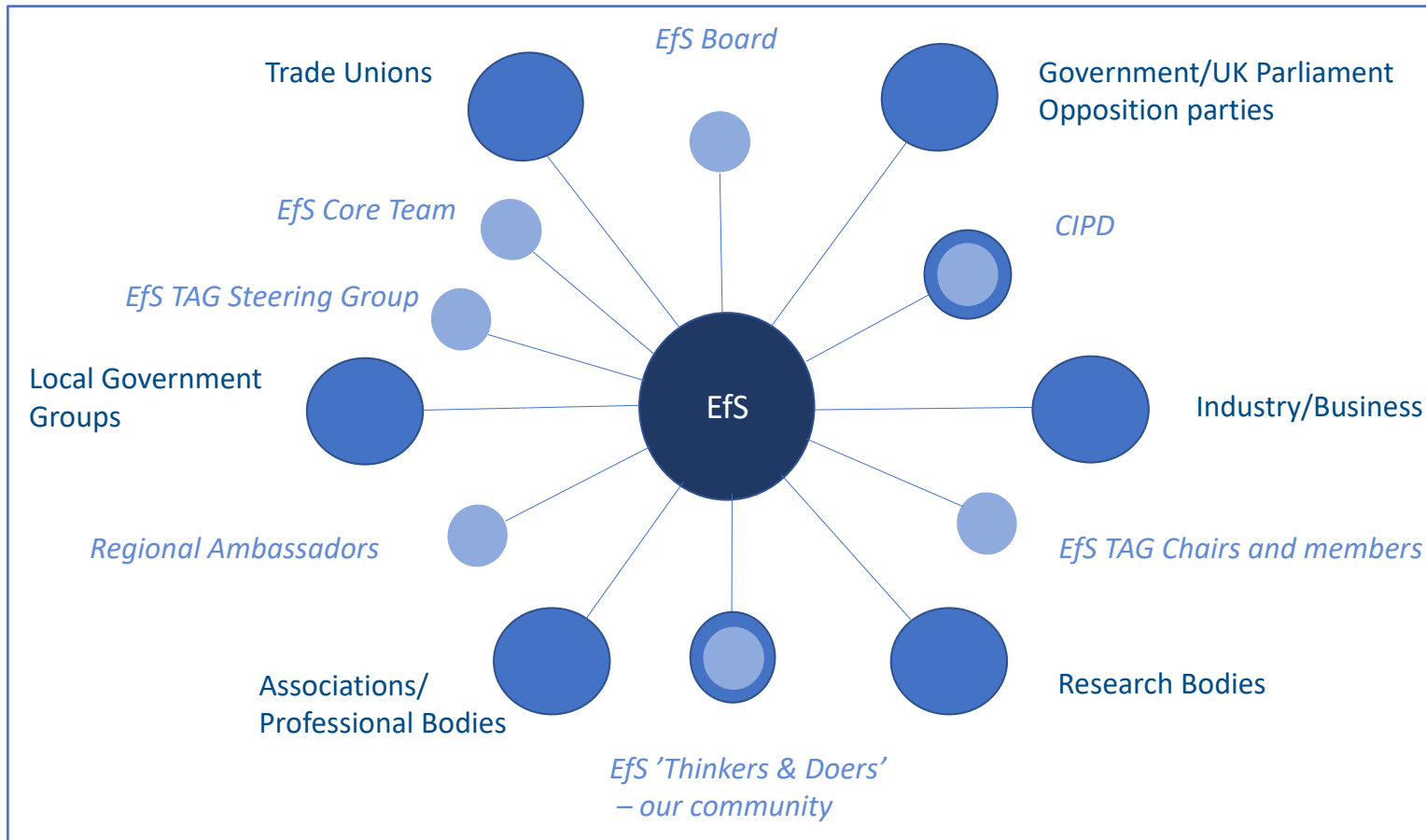
Our motto in phase 2 is, *'ask not what Efs can do for you but what you can do for employee engagement in our country'*.

Nita and David conclude by saying:

"We remain utterly committed and totally passionate about the importance of this topic and will seek to support Efs people and events wherever we can. We are also conscious that for the movement to continue to flourish it must not be based around specific high-profile individuals so we will try to be cheerleaders rather than be the leaders of Efs. Please let no-one be in any doubt about our continuing commitment. We cannot express fully enough just how pleased and proud we are to see the movement grow and develop particularly at this time of incredible national challenge. We are also delighted that the core team and TAG Steering Group have started an effective process of bringing clarity under the headings of maintenance, growth and ambition."

Appendix 3 - Stakeholders

Stakeholders have been identified as the following groups:



Key:

● EFS 'internal' stakeholders

● EFS external stakeholders

● Mixed internal and external stakeholders