



A Union of Professionals

WORK SHOULDN'T HURT

Strategic Planning: Improving Workplace Health and Safety

- An important first step in creating a safer and healthier workplace is **identifying the problems and hazards** that put workers at risk for injury, illness and/or stress on the job.
- Once problems have been identified, the next step is to put together a **plan for addressing them**—and then putting that plan into action.
- If all health and safety problems in the workplace were immediately and appropriately corrected when workers and unions brought them to the attention of management, there might be little need for a multistep strategic planning process. However, the reality is that

to get real attention and satisfactory action regarding these

- workplace problems and conditions, it is often necessary to map out all of the possible steps needed to correct the hazards—and then put that plan into action.

Why do strategic planning?

- Most union health and safety committees are busy enough dealing with the many issues and problems that endanger workers' health and safety every day. Why add a complex planning process on top of everything these committees have to do already?
- The answer is simple: because there are significant health and safety problems that simply will not get addressed without a comprehensive plan for bringing about solutions. This strategic planning process allows a union to do more than react. It allows the union to set its own agenda, its own priorities, and work toward the solutions it has identified. A good strategic plan also promotes the involvement of members in working toward the solutions, thereby increasing member involvement in health and safety and in the union.

What is Strategic Planning?

Strategic planning involves putting together a plan that serves as a map to get from "here" (problem unsolved) to "there" (problem solved).

Strategic planning includes the following steps:

- Determining important issues and problem areas
- Selecting a specific, priority problem to solve;
- Identifying possible and desired solutions;
- Developing an overall plan for getting the problem solved;
- Carrying out specific actions that address all of the elements in the plan;
- Publicizing the progress and successes of the actions; and
- Evaluating and redeveloping the plan as needed.

Elements of a strategic planning

process

Answering the following kinds of questions will help in developing a strategic plan to solve a health or safety problem:

The **American Federation of Teachers** is a union of 1.7 million professionals that champions fairness; democracy; economic opportunity; and high-quality public education, healthcare and public services for our students, their families and our communities. We are committed to advancing these principles through community engagement, organizing, collective bargaining and political activism, and especially through the work our members do.

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- What is the problem you have chosen to take on or address?
- Why did you select this issue or problem? Why is this important to the members and the union?
- What solutions will you seek (consider both short-term and long-term solutions)?
- What information do you already know that will help you solve this problem?
- What information do you need to solve this problem? Where can you get this information?
- How will you communicate with your members about this issue/problem, and what are the key things you want your membership to know or understand?
- What barriers might you face in trying to achieve your short- and/or long-term goals?
- What could you do to overcome these barriers?
- Who might be allies in this campaign (besides your members)?



- What would an action plan look like? List specific tasks/things that could be done to build a campaign around your issue/problem, along with the people who will do each task, the dates by which the task needs to be accomplished, and the resources needed to accomplish the task.
- How will this strategy for dealing with the issue/problem help involve your members?
- How will you evaluate this effort?
- Often, reaching a long-term solution to a workplace health or safety problem means identifying shorter-term goals or objectives along the way.

These short-term goals or objectives should be **SMART**:

- **Specific**: Specify a key result to be accomplished.
- **Measurable**, so you can know whether you've succeeded or not.

- **Assignable**: Specify who will do it.
- **Realistic**, but still represents a change and a challenge.
- **Time-related**: Specify the amount of time needed or deadline.

Developing an action plan

One core activity of strategic planning is developing an **action plan**. This plan is actually a specific road map for achieving the solution to the problem identified. This road map will take the plan from paper into action.

Elements of an action plan can include:

- **What**: List the different things that need to be done, step by step (e.g., gather information, communicate with, and involve members).
- **When**: Develop a timetable with specific dates for achieving each task. Make sure your timetables are reasonable!
- **Who**: Someone needs to be assigned to each particular task; that individual will take responsibility for the task, keep a record of activities and report back on progress.
- **How**: Identify resources (money, time, people and materials, for example) that might be needed, and where you can find these resources.

You may face **obstacles** along the way to reaching your solution. It is useful to predict what challenges you might encounter, and make sure your action plan addresses each one.

There will also be **allies** who support your efforts to address the health or safety problem you have chosen. Identify potential allies and make sure your action plan includes reaching out and involving them.

It will be necessary to meet regularly to review progress and modify your plan as needed.

At the end of the allotted time for the strategic plan, it is important to *evaluate* the successes, strengths, and weaknesses of the plan and its progress. This will enable you to incorporate what was learned into future strategic planning activities for the next problem or set of problems that you want to see addressed.

The ability to put together a plan and put that plan into action is a prerequisite for success in addressing health and safety in the workplace, especially for tough, long-standing health and safety problems that have been difficult to get corrected.

For more information, contact the health and safety team at 4healthandsafety@aft.org [May 2022]