

FACILITATOR NOTES

MAKING TEAMS WORK

CREATING COMMON PURPOSE AND UNITY OF EFFORT

TEAM CHARTER

The following workshop design has been developed by Dave Stewart and colleagues at The Fresh Air Leadership Company. We claim no Intellectual Property rights and will be delighted if it is used widely to help leaders, teams, and organisations work more effectively together. This is a guide only and you will want to adapt it to your own needs.

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Get in touch at dave@freshairleadership.com
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WHY DO THIS?

Clients will present with a requirement to support their team's development for a variety of reasons in a variety of contexts.

For example, a new CEO arrives in post and wants to refresh the leadership team. An entrepreneur is scaling the business and needs to build out a leadership team. There has been a merger and the new team needs to integrate and spin up quickly.

A charter is one way of helping...

It provides a vehicle for team members to explore and capture their common purpose and values, their vision, and ways of working. This can serve as a stand-alone piece of work or form part of a longer-term team coaching assignment. It can feed into follow-on work to create a team development road map, and/or better alignment with the Board, and/or as part of a wider staff engagement programme.

As important as a tangible written charter or infographic version are, the conversations and collective buy-in which achieve this are critical. So too are the ongoing modelling and holding to account by team colleagues in both spirit and word.

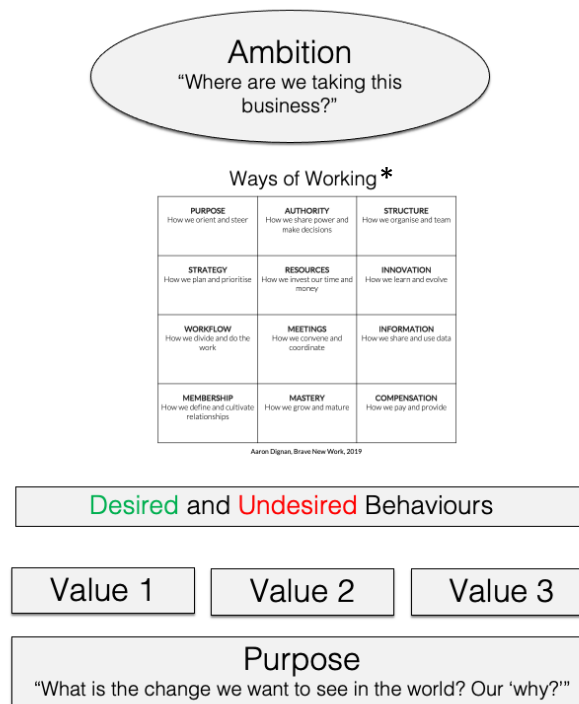
A final caveat. The charter should not be adopted as a tablet of stone. It should be subject to regular review, particularly in light of changing external circumstances and/or team membership. Think of it as a framework of ongoing questions.

A CHARTER FRAMEWORK

The diagram overleaf shows the elements of the charter framework we use.

In terms of how this can flow when written up (or as an infographic), we offer the following:

- This is who we are and what we stand for.
- This is the future we want to create.
- This is how we will organise and conduct ourselves.



* This is just one of a number of models we use to provoke reflection around ways of working

SCOPING THE REQUIREMENT

First, engage with the client to understand context, desired outcomes, and outputs, and to what extent charter elements such as Purpose, Values, and Vision are already established and accepted by team members. An example set of outcomes and outputs is below. Human systems move in the direction of the questions that are most passionately and persistently ask (Cooperrider, D. 1987), and so we set all of this within a life-giving inquiry question that defines the guiding purpose for the workshop (and the team's work beyond this!).

| “What is it to lead well together, confidently living our purpose and values, and delivering on our ambitious vision?” | |
|---|---|
| Desired Outcomes | Hard Outputs |
| <ul style="list-style-type: none"> ➤ Senior Leadership Team (SLT) members know and trust one another more, and are therefore able to offer more courage and confidence into richer and more creatively challenging meetings. ➤ They understand, embrace, and model company values as a foundation for how they operate and hold one another to account as a team, and more widely across the company. ➤ They commit to one another and the scale up journey through the co-creation of a team charter which becomes, in due course, the basis of the “Our Way” for the whole organisation. | <p>A. First version SLT charter, comprising of:</p> <ul style="list-style-type: none"> • Purpose • Values • Ways of Working • Vision/Ambition <p>B. Next steps. Agreed/accountable actions.</p> |

TEAM ENGAGEMENT

Next, engage with team members on a confidential 1-2-1 basis. The purpose of this is to explore actual buy-in with existing elements, unearth alternative points of view, identify common themes, and address hopes and fears.

This part of the process will allow you to refine and de-risk the design of the workshop. Share any common themes that emerge with the team leader on a non-attributable basis (to respect confidentiality). Bring these common themes into the workshop. See later.

An example email question set is below.

- #1 Reflect on what you experience SLT’s lived values to be. What is it that guides difficult conversations and decisions?
- #2 I have attached a copy of the company’s ambition/vision set by the CEO. What are your thoughts and feelings about this?
- #3 In terms of operating as a team, what is really working for you at the moment? What behaviours are evident when you work together?
- #4 What 3 things could make this team even better? Is there anything getting in the way?
- #5 Finally, let me know about the following:
 - Hopes and fears for the day.
 - Medical conditions, medication, injuries.
 - Food intolerances and dietary needs.

VENUE

Book an offsite venue that provides lots of space, ideally with access to countryside right out of the door. This will create the conditions for imaginative, divergent thinking and support psychological safety. By contrast, a cramped boardroom environment can suppress open discussion and creative thought and accentuate power differences in a team.

PROGRAMME

Build time into the workshop programme for small group and whole-team work. Depending on how many of the charter elements are already established, the size of the team, and whether there are any difficult team dynamics to explore and resolve, the workshop may take between one and two days. The following are attached:

- Annex A. Example workshop programme.
- Annex B. Purpose worksheet. This can be useful to untangle the nuanced difference between purpose and mission, and to identify the team's stakeholders.
- Annex C. Vision worksheet. This can be used to test an existing ambition/vision.
- Annex D. Team operating models. These can be used to promote discussion around effective team working.

DELIVERING AND DEVELOPING THE CHARTER

We use a printed A0 poster of the charter framework as a means of capturing and collating the output from each of the workshop sessions i.e., these may be post-it notes or flip chart pages which are placed alongside or on top of the framework elements.

This results in an inelegant, first version of the charter which can then be reviewed and written up and/or illustrated with imagery. Agree with the client at the outset who will do this. If it is you, ensure this is scoped into the price. If it is a member(s) of SLT, offer to hold them to account e.g., by contacting them at an agreed frequency/date. See Follow Through section below.

WORKSHOP PRINCIPLES

See Annex E.

FOLLOW THROUGH

After the workshop, there is still a lot of work to be done to refine the outputs of the day e.g., further developing the text, adding some imagery or artwork, raising projects to enable the desired ways of working etc.

The risk now is of a loss of momentum. We always offer to hold the team to account. This can be as simple as chaser emails at agreed intervals, or follow-on workshops and/or meetings and/or coaching. We also offer to sense-check any project initiation documents the team wishes to raise.

It may be that not all team members attended the workshop and so there may also be a task around bringing them into the conversations that took place and the draft charter that emerged. This should be raised during the workshop and a plan of action developed.

If the workshop identifies a range of areas for development, a follow-on workshop to specifically create a team development roadmap will be useful. This is the subject of a separate set of facilitator notes.

Annexes:

- A. Example workshop programme.
- B. Purpose worksheet.
- C. Vision worksheet.
- D. Team operating models.
- E. Workshop Principles

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EXAMPLE WORKSHOP PROGRAMME

| “What is it to lead well together, confidently living our purpose and values, and delivering on our ambitious vision?” | |
|---|---|
| Desired Outcomes | Hard Outputs |
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| | | |
|-----------|--|---|
| | Pre-event engagement with all participants to socialise the workshop inquiry theme, outputs, and outcomes; invite responses around values, vision, team working, behaviours; preparation of 5-4-3-2-1 personal disclosure stories; provide information on admin; and uncover any other issues and anxieties. | By email |
| | | |
| | <p>FRAMING THE DAY</p> <p>CEO to frame the day as an opportunity to get to know one another better and explore [insert workshop theme] in order to deliver [insert the outcomes].</p> <p>Facilitator explains the shape, sequence, and outputs of the day</p> | |
| Session 1 | <p>DISCLOSURE EXERCISE</p> <p>Conduct 5-4-3-2-1 disclosure exercise. See https://freshairleadership.com/making-teams-work-the-surprising-power-of-disclosure-in-fostering-trust/</p> <p>This will deepen understanding of one another, improve trust and promote a sense of psychological safety.</p> | See separate Facilitator Notes for this activity. |

| | | |
|-----------|--|---|
| | Participants will have prepared their 5-4-3-2-1 prior to the event. | |
| Session 2 | FOUNDATIONS: TEAM PURPOSE Sub-group work followed by presentations to the whole team. Discuss/agree (at least) a working statement of Purpose/Mission. | Hand out Purpose worksheet. Annex B. |
| Session 3 | FOUNDATIONS: VALUES What are our lived values? How do these align with our organisational values? Does it matter if they are different? How do we actually use our values? Sub-group work followed by presentations to the whole team. Discuss/agree/park team values statements | Hand out the analysis of the individual responses. There may be some clusters which may offer insights. |
| Session 4 | ASPIRATIONS: VISION It is assumed that some form of vision statement exists. This is an opportunity for the CEO to confirm this, bring it to life, and seek feedback. Sub-group work followed by presentations to the whole team using the content and questions in the vision worksheet. If there is no existing vision, or a new one is required, a separate process/workshop(s) will be required. | Hand out Vision worksheet. Annex C. |
| Session 5 | OPERATIONS: BEHAVIOURS AND WAYS OF WORKING Explore a range of team operating models and responses from the pre-workshop engagement. What is it to lead well together? What do our stakeholders need from us? What do we need from one another? Sub-group work followed by presentations to the whole team. | Hand out Team operating models worksheet (Annex D) and the summarised feedback from pre-workshop responses. |
| Session 6 | SENSE CHECK By this stage of the day, the team will have developed (hopefully!) working versions of Purpose/Mission, Values, Ambition/Vision, and Ways of Working. | |

| | | |
|--|--|--|
| | <p>These should be placed on/alongside the A0 charter framework poster positioned on the floor in the middle of the circle of participants' chairs.</p> <p>This session is an opportunity for participants to reflect individually on the charter that is emerging.</p> <p>After a time, call everyone together and facilitate a capping discussion to make any amendments and identify any areas of disagreement/further development.</p> | |
| | <p>CLOSING TEAM MEETING</p> <p>CEO to chair a team meeting to review and confirm ownership and accountability for the actions arising during the day.</p> <p>Also, an invitation to colleagues to countersign the A0 charter framework on which Purpose/Mission, Values, Ways of Working, Ambition/Vision have been captured.</p> <p>Closing remarks from CEO.</p> | |

PURPOSE WORKSHEET

The term PURPOSE refers to WHY an organisation exists. This is enduring. It is foundational.

(Contrast this with VISION which conveys a sense of direction, of the future you want to create. It is aspirational and may change over time).

The closely related and sometimes interchangeable term MISSION refers to WHAT a company does to fulfil its PURPOSE. It may also refer to WHO the prime beneficiaries are.

Questions

1. Why does the Senior Leadership Team exist?
2. What does it deliver?
3. To whom?
4. Are there any other stakeholders? Who else cares about what you do as a team?
5. How will you frame SLT's purpose, or if you prefer, mission?

VISION WORKSHEET

The term “Vision” describes the sort of future the company wants to create. It may have a tangible and measurable feel (e.g., the key outcome of a 5-year strategic plan) or be more aspirational and unbounded. Unlike a mission/purpose statement (which is enduring and foundational, and states what you do every day), it is changeable (but not on a frequent basis!) and may reflect the market(s) and wider context you operate in.

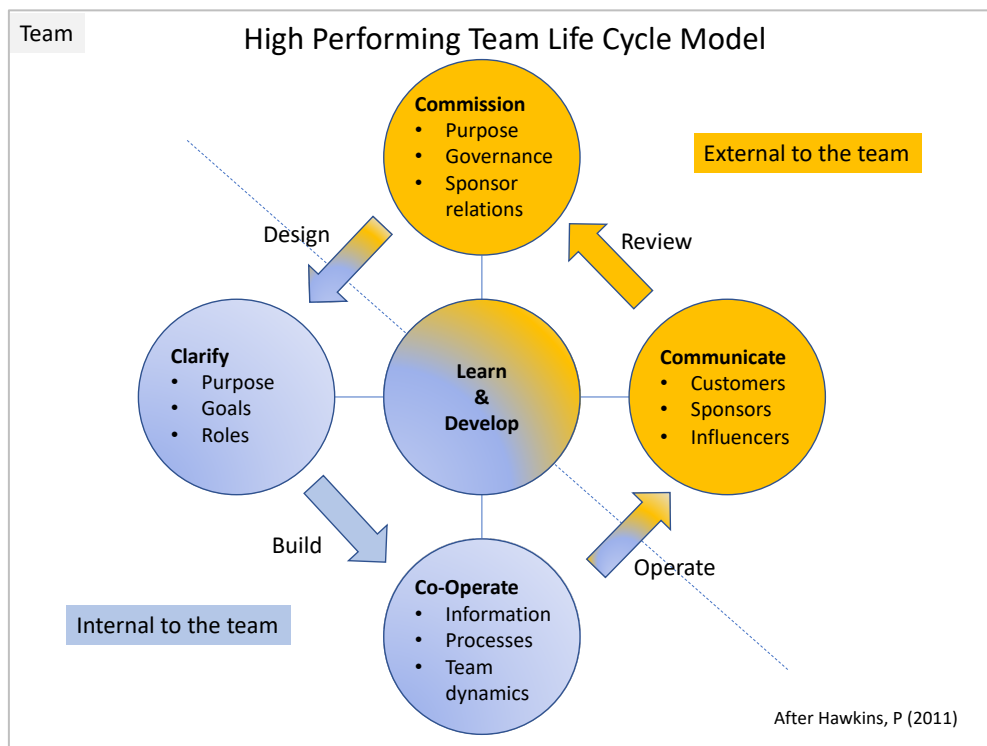
A compelling vision will appeal to those inside and outside of the organisation and address many or all of the following:

| Your vision: | 1 | 2 | 3 | 4 |
|--|---|---|---|---|
| Relevant. Is it inspiring, yet anchored to reality and your needs? | | | | |
| Clear and challenging. Is it bold yet possible; and clear enough to set direction with? | | | | |
| Focusing. Does it mark a point in the future with defined strategic outcomes? | | | | |
| Guiding. Does it provide freedom of action, within a framework of direction (not rules)? | | | | |
| Flexible. Does it allow personal initiative and alternate responses in the light of changing conditions? | | | | |
| Exciting & Desirable. Does it feel like a “cause”? Does it appeal to the long term interests of staff and other stakeholders? | | | | |
| Overall strength (average of all scores) | 1 | 2 | 3 | 4 |

Consider these questions as a sub-group and be prepared to present your answers in plenary:

1. How does the company vision measure up against these attributes?
2. Is there anything you would change? Why?
3. Who are the stakeholders who need to understand and buy-in to the vision? How well do they already understand and buy-in to it?

TEAM OPERATING MODELS



Creating Psychological Safety

| | Setting the Stage | Inviting Participation | Responding Productively |
|------------------|--|--|---|
| Leadership Tasks | Frame the work <ul style="list-style-type: none"> • Set expectations around failure, uncertainty, interdependence to clarify the need for voice Emphasise purpose <ul style="list-style-type: none"> • Identify what's at stake, why it matters, for whom it matters | Demonstrate situational humility <ul style="list-style-type: none"> • Acknowledge gaps Practice inquiry <ul style="list-style-type: none"> • Ask good questions • Model active listening Set up structures and processes <ul style="list-style-type: none"> • Forums for input • Guidelines for discussion | Express appreciation <ul style="list-style-type: none"> • Listen • Acknowledge and thank Destigmatise "failure" <ul style="list-style-type: none"> • Look forward • Offer help • Discuss, consider, brainstorm next steps Sanction clear violations |
| Accomplishes | Shared expectations and meaning | Confidence that voice is welcome | Orientation towards continuous learning |

Amy Edmondson (1999)

High Performing Teams

After Lencioni, P (2002)



Team members focus on achieving collective results

Team members hold one another accountable for delivering these decisions

Team members commit to decisions and plans of action

Team members engage in unfiltered conflict around ideas

Team members trust one another

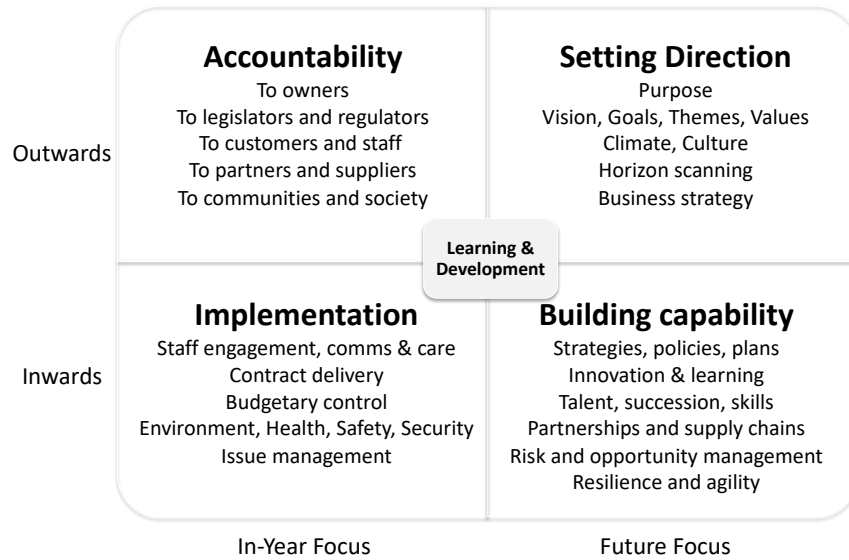
Operating System Canvas

| | | |
|--|---|---|
| PURPOSE How we orient and steer | AUTHORITY How we share power and make decisions | STRUCTURE How we organise and team |
| STRATEGY How we plan and prioritise | RESOURCES How we invest our time and money | INNOVATION How we learn and evolve |
| WORKFLOW How we divide and do the work | MEETINGS How we convene and coordinate | INFORMATION How we share and use data |
| MEMBERSHIP How we define and cultivate relationships | MASTERY How we grow and mature | COMPENSATION How we pay and provide |

Aaron Dignan, Brave New Work, 2019

What Do Leadership Teams Do?

Derived from the Institute of Directors Governance Model



WORKSHOP PRINCIPLES

Some key principles for running this type of workshop:

- At the start of the day, the team leader should frame the importance of the workshop.
- Next, the facilitator contracts with participants over how the day will work, managing expectations around the quality of the day's outputs i.e., very much a first version charter for subsequent development and refinement.
- The facilitator introduces a number of question-based sessions and creates the space for participants to engage with these.
- The facilitator is guardian of the process, spotter of rabbit holes, and watcher of the clock.
- Participants' voices are the most important in the room. This is their space for exploration and not yours for filling with content.
- Some participants will naturally be more vocal than others. Ensure everyone has an opportunity to contribute. Some people need more time and space than others.
- Where participants' words need to be captured (e.g., on flip charts as a sub-group response to a question), they should write them down. The facilitator should not interpret, summarise, or write their words.
- Where depth/difficulty of conversation indicate a likely time over-run, recontract with participants over how best to use the remainder of the day.
- Capture the outputs on post-it notes, flip charts or work direct onto laptop and big screen. We prefer using post-it notes and flip charts as contributors' handwriting is more "owned". They can also be placed on the floor in the centre of the room and promote a sense of "our work, here amongst us" in a way that a projected image "over there" cannot. Take photos as back up.
- The facilitator hands over to the team leader at the end of the day to run a short team meeting to confirm actions and owners and agree the holding to account process.