

# **APG Community Based Projects An Action Learning Process**

## **Cohort 5**

**April 2013 – February 2014**

This manual was created for the APG Senior Leadership Cohort. It incorporates material developed for the Office of Personnel Management: Federal Executive Institute and the Presidential Management Fellows Program.

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## Community Based Project (CBP)– Process Overview

Key Actions	Outcomes	Timeframes
Generating Input - potential project topics – SES Interviews	Draft list of topics	Kick Off Meeting and April 2013
CBP dialogue & topic selection with APG SES, current cohort and alumni	Topics selected & teams formed Sponsor identified Coach assigned	May Session
Develop team charter	Sponsor Sign Off - charter & initial project plan Submit to Cohort Director and Executive Coach	Jun 30, 2013
Project team work Meet bi-weekly or as needed Monthly meeting with coach Status updates to sponsor	Conduct project work  Reflect on learning about leadership, team work, system dynamics & change	Jun 2013 – Feb 2014
Interim SES briefings	Report on: Goal & expected outcomes Progress & challenges SES feedback & guidance Learning about leadership	Oct/Nov 2013
Final SES briefings	Report on: Outcomes & impact Transition plan: close down, institutionalize or continue work	Feb 19, 2014

## CBP Project Phases

Project Phases	Ongoing Reflection & Evaluation
<p><b>Phase I – Getting Started</b>            Form the team            Determine focus and scope of effort            Create charter            Build initial project plan            Tools:                Team facilitation model                Individual learning goals                Sample ground rules                Team start up tools</p> <p><b>Phase II - Exploring</b>            Engage stakeholders &amp; gather data            Further refine focus, goals, outcomes based on what's learned            Tools:                Stakeholder mapping                Leadership dialogue model                Decision making, problem solving model                Force field analysis</p> <p><b>Phase III – Executing</b>            Taking action</p> <p><b>Phase IV – Transitioning &amp; Closing</b>            Evaluate impact            Summarize learning about self, teams, systems and leadership            Brief SES group            Plan for the future: close, transition or institutionalize</p>	<p><b>Self Reflection Questions</b>            Explore your personal contribution to the team, impact on others, particular strengths you bring and areas you want to develop ...</p> <p><b>Team Effectiveness Questions</b>            How well you're working together, level of engagement by different members, balance of participation, sharing the burden, challenging assumptions, balancing relationships with results ...</p> <p><b>Learning About Systems</b>            Making meaning of what's going on, creating organizational focus and leading change in complex systems...</p> <p><b>Learning About Leadership</b>            How is my definition of leadership evolving; what skills and capabilities are needed; how does this inform how I lead; what do I want to be sure to remember ...</p> <p>Tools            - Team debrief</p>

## Guidelines for the Community Based Action Learning Project

APG is undergoing significant change as BRAC doubles the number of employees on the installation and a large percentage of the workforce becomes retirement eligible. These changes occur in a broader context of globalization, world politics, changing roles of the military, technological advances and others.

The Community Based Project creates teams of leaders from the cohort that take on a strategic challenge facing the installation, explore it, engage with relevant players at APG and the broader community and move the issues forward in some visible or measurable way (*Action*). All the while, you'll reflect on what you're learning about leading yourself, teams and systems (*Learning*). This experience provides the opportunity to explore effective teamwork, problem solving, strategic thinking, political savvy, critical thinking and organizational engagement strategies. Ultimately, as you take the process of action learning into your day-to-day work, you'll be building a learning organization – one that solves problems and engages adaptive issues better as you meet the evolving challenges of leadership in these changing times.

***Action Learning***  
*Enhancing leadership skills  
by using real organizational  
challenges as the field for  
learning.*

### Community Based Project Criteria

- Addresses a strategic issue facing the installation that is typically an adaptive challenge where there is no ready-made solution
- Delivers significant, measurable, attainable and valuable benefits to APG
- Challenges each team members' leadership and team building skills
- Challenges each team member to think strategically beyond their own purview and engage relevant constituents on the installation
- Includes a clear timeframe: project beginning and end, significant milestones or project phases that span the majority of the program
- Requires an executable project plan signed off by your Executive Sponsor

Interim SES Briefing: Oct/Nov 2013 – progress, challenges, expected outcomes

Final SES Briefing: Feb 2014 – outcomes, leadership learning, sustainability plan to continue this work into the future

## Action Learning Roles and Responsibilities

### Team Members

Each community based project team will have five members from different organizations on the installation. Rotating through the following team roles provides rich opportunities for learning.

Facilitator – prepares agendas and runs meetings

Coach – ensures team's adherence to action learning principles and conducts the after action learning review at the end of the meeting

Recorder – documents discussions, decisions, actions and accountability

Project Manager – uses project management tools and techniques to plan, execute and track the team's work

Point of Contact – ensure effective interface and communication with the Executive Sponsor, other teams and relevant stakeholders as necessary

Teams will decide how best to rotate through these roles with the understanding that over the team's lifecycle, each member will have the opportunity to try on each role multiple times.

### Executive Sponsor

Champions the effort, helps the team gain access and resources, serves as strategic thinking partner and advisor to the group and ensures clear goals and accountability for results. In addition, the sponsor is also interested in the quality of leadership learning occurring for individuals and the team.

### Executive Coach

Supports the team in person and by phone during the project lifecycle, coaches on the action learning process, serves as strategic thinking partner, provides models and frameworks relevant to the team's work, facilitates team development and feedback dialogues and interfaces with the Executive Sponsor on occasion to discuss team's development.

### Cohort Director

Maintains contact with and provides support to Executive Coaches and CBP teams as the team's work unfolds. Communicates with faculty in order to ensure linkages between course content and team CBP team needs.

## Action Learning – Some Best Practices

*Action Learning can be a powerful way to learn about leadership and systems change. Below are some best practices to use as you select projects and execute them.*

1. **Choose a topic that will deliver significant 'business results' or visible organizational impact** – this will grab senior leaders' attention and interest – focus on generating savings, leveraging existing assets across organizations, enhancing revenue... There is a correlation between the size and complexity of the project and the breadth and depth of learning!
2. **Involve senior leaders throughout the initiative** – have them help you scope it, stay connected to them as you go forward, understand their unique expectations and challenges they face and work to address these, bring them what you're learning to enhance their situational awareness...
3. **Get support and buy-in from your direct managers** – negotiate to shift your priorities so you can focus on the action learning work, if the project is of strategic importance, getting the time to deliver on it should be a no brainer – share credit for your success widely and acknowledge those who took things off your plate to allow you to deliver
4. **Your team is accountable for project execution and results** – be clear on the business case for your project (why it matters and what it will deliver), provide periodic executive briefings to keep on track and keep leadership with you.
5. **Use your coach's expertise to bring just-in-time content and coaching that helps you move forward** – get their feedback, explore your team dynamic and accountability to each other, source useful tools, models, frameworks and expertise needed to be successful
6. **Balance action with reflection** – likely you're good at delivering results, action learning is about learning how to learn as leaders – in context – a critical skill, use this opportunity to learn that skill that will serve you for the rest of your career, slow down, think about what you're doing, what's effective and what's not, learn from this as you go – that's what you'll carry forward

# Getting Started



## Key Team Start up Actions

- Meet with your Executive Sponsor and coach to clarify roles and how you will work together
- Define your purpose and develop a team charter
- Review “Team Success Factors” (in Team Effectiveness section of this manual) and develop ground rules and agreements relevant to your work together
- Identify stakeholders and develop an engagement strategy to better understand your topic and begin to build support for action
- Develop a detailed work plan for July through August and identify longer term milestones through the end of the year and into 2014

## A Team Facilitation Model

This meeting planning and facilitation model summarizes many different theories and best practices into a simple three step process. Consider using this as a template as you create your project plan and develop agendas for each meeting. Mastering this model will enable you to lead meetings more effectively and facilitate from the sidelines as a team member as well.

### *Clarify – Options – Action*

Effective meetings often include the following three phases:

Clarify – Unpacking the issues – exploring different points of view;

Options – Narrowing the discussion to important themes and elements;

Action – Closing by deciding on actions and the way forward.

The *Clarify – Options – Action* framework is both macro and micro. Large, complex or adaptive issues or strategic planning activities may require longer periods of time in each phase – weeks or months. Within each of these phases however we can cycle through the *Clarify – Options – Action* framework to explore subordinate issues.

### ***Clarify – framing – understanding complexity – re-framing***

- Clarify the issue, problem, challenge we're addressing
- How is this a challenge and for whom?
- How is it being dealt with now?
- What do others say about this challenge?
- What stakeholders and other points of view do we need to consider?

### ***Options – the critical few***

- Based on our discussion – how are we seeing things differently?
- What are the critical few issues or items that need further discussion or attention?
- What options are emerging?
- 

### ***Actions – the way forward***

- Given this – what actions do we need to take?
- Who needs to be informed, involved or influenced?
- Who will do what, by when?
- How we'll track and follow up?
- Meet again – when, how long?

## **Sample First Meeting Agenda**

Prepare for the meeting by identifying roles – facilitator, coach, recorder – and developing an agenda of what you want to accomplish. Consider what critical questions you want to explore to achieve your desired outcomes.

### **Convene Meeting – Confirm Action Learning Roles**

### **Our Agenda and Outcomes For Today**

### **Our Learning Agenda - Action Learning Principles**

### **Sample Guiding Questions**

#### **What do we need to know about the project?**

- What background information is important to understand?
- Why is the issue important?
- What might happen if it is not addressed?
- Who is, or should be involved in addressing the issue?
- Who is knowledgeable about it?
- How has the issue been addressed so far and with what results?
- What major obstacles or challenges need to be overcome?
- What is our vision of the work this team needs to do to resolve the issue?

#### **What are the goals of this team?**

- What are the parameters of the project, the deliverable, and the timeline?
- What assumptions are we making – what challenges do we expect?
- What are our next steps in building agreements with our sponsor?

#### **Team Discussion (to be continued in this or subsequent meetings)**

- What ground rules do we want to adopt for our work together?
- How will we assign the coach, facilitator and recorder roles?
- How will we work with our sponsor?
- What individual and team learning goals do we want to adopt?
- How well are we using the six ideal action learning components (p.14)?
- What process will we use for journaling individual and team reflections?
- When, where, how and how often will we meet? Next meeting?
- What actions will we take between now and our next meeting?

### **Review – facilitated by ‘coach’ for last 10 minutes of the meeting**

- How did we work together today – what worked well – what would we change?

### **Adjourn**

## Sample Ground Rules

In the construction business, it is often said: 'You can pay now or you can pay later... but you will pay.' So it goes with teams in the workplace. Simply put: important planning and thought is necessary if we are to achieve our goals. If we anticipate some of the challenges we're likely to experience, we'll be well equipped to respond to them when they surface. One strategy for building a strong foundation is to create team ground rules.

Action Learning ground rules:

- **Make statements only in response to questions.**
- **Assign roles for each session – facilitator, coach, recorder**
- **Coach intervenes as necessary to keep the action learning principles alive**
- **Cultivate openness to learning – Agree to engage with each other to that end**

Some areas to consider discussing for ground rules:

- **Participation & Engagement**
- **Exploring Differences**
- **Carry Your Part of the Load**
- **Decision Making**
- **Working Through Conflict**
- **Communication Outside the Team**
- **Confidentiality**
- **Time and Effort we Plan to Put Toward the Team's Work**

## Individual Learning Goals

Think through the questions below as you prepare for your first team meeting. Reflecting on these and sharing your answers with each other will help set a foundation for your learning together and enable each member to get what they came for and support others in their learning as well.

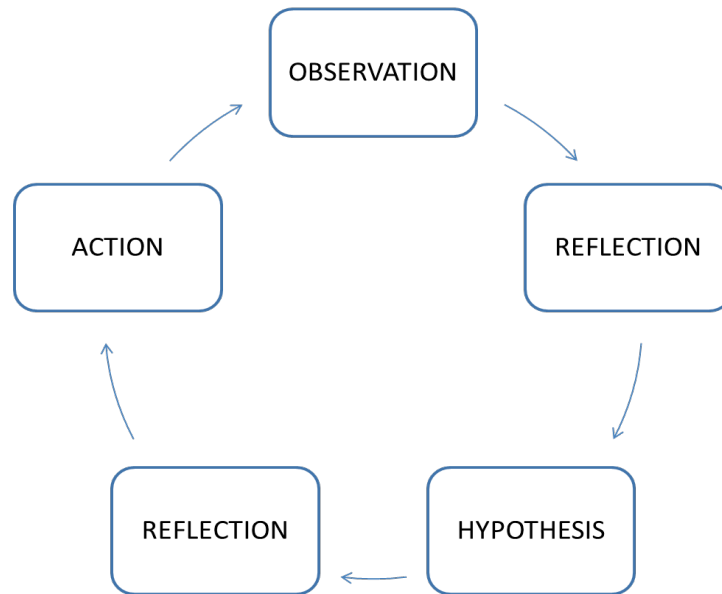
Why did I choose this topic? What about it is compelling to me?

What do I hope to learn by joining this team and working on this topic?

What leadership competencies do I want to strengthen during this program? How might I do that as a member of this team? *Consider the OPM leadership competencies, your assessment center feedback and your 360 feedback when you receive it.*

# Action Learning Background Material

## ACTION LEARNING CYCLE



## What is Action Learning?

Action learning combines many leading theories of ‘learning by doing’ and has a long history of proven success in adult education. Since its development in the 1980’s by Reginald Revans, it has been used extensively in private industry, government and academia as a management and leadership development tool.

***Action learning's greatest value is its capacity for equipping individuals, teams and organizations to more effectively respond to change.”***

**- Michael Marquardt**

The action learning framework outlined in this guide builds on and incorporates the model developed by Michael J. Marquardt (2004) in his book *Optimizing the Power of Action Learning*, as well as ideas from William J. Rothwell (1999) in his *Action Learning Guide*, and Peter Senge (1994) in *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*.

Action Learning ascribes to the notion of ‘equifinality’ – that there are many paths, many solutions and ways forward when dealing with complex adaptive challenges. As such, it creates a context where teams frame up a challenge, gather data from a range of viewpoints, reframe it and generate ways forward – all through a process of seeking important questions to answer and reflecting on the answers as they become clear. Ultimately, this helps team members to test out new ways of making meaning, interacting and planning for change.

### **Six Key Components of Action Learning** (Marquardt 2004)

#### **Project: An important or urgent problem**

Ideal projects are focused on important, challenging and complex issues for which there are no known solutions and that require creativity, innovation and multiple perspectives to solve.

#### **Team: A diverse group**

The most effective teams have members from different organizations and professional backgrounds with a range of skills, life experiences and perspectives. Team members rotate through important leadership, facilitation and coaching roles in order to enhance skills in these areas. To maximize impact and learning, members are asked to make attending team meetings a top priority.

## **Inquiry: Insightful questioning & reflective listening**

This process requires that all *statements within the group be made only in response to questions*. The action learning model helps to reframe problems and challenge assumptions, promoting an introspective, self-aware learning process. Working in this way can initially seem challenging – over time, you'll see how this listening and questioning process allows for a deeper understanding critical to addressing complex, adaptive challenges where no readily available solutions exist.

***"We do not see things  
as they are, we see  
them as we are."***  
– The Talmud

## **Action: Implement action to address the problem**

Taking action allows for real energy, innovation and learning to take place. Moving real issues forward and resolving organizational challenges increases the transfer of learning from the practice field to the workplace.

## **Learning: Commitment to learn**

Everyone on the team agrees to be a learner and approach the work in a spirit of unknowing that promotes equality, vulnerability and a willingness to develop as individuals and as a group. This commitment to learning supports the development of individual and organizational leadership competencies.

## **Coach: Presence of an action learning coach**

A 'coach' is assigned from the group for each session. Their job is to 'get on the balcony' and observe how the group is adhering to the action learning principles – ensuring that group dialogue is in response to questions rather than a free-for-all discussion. Coaches typically intervene at least twice during the meeting: early on and at 10 minutes before the end of the meeting to conduct the learning 'review.' Coaches can also ask questions at any point in order to re-focus the group on the action learning process. The coach's role is critical to the team achieving the dual goals of results and learning.

The team's Executive Coach will also serve as a 'coach' when present – playing a more active role early in the team lifecycle and less of a role as the team develops.

## **Some thoughts on inquiry: the reflective basis of action learning**

Action learning's emphasis on reflection distinguishes it from other 'learning-by-doing' models. The key to action learning is the combination of personal and group reflection, not only on the issue at hand, but also regarding a



group's work as a team and each individual's relationships and learning styles. When teams take time to reflect on group and individual learning, thinking and interacting, they become increasingly able to perceive and then challenge underlying beliefs and assumptions that can limit their scope of understanding and innovation.

Inquiry is a key component of action learning. Asking questions about the problem helps build critical and strategic thinking skills and problem solving abilities - why the project is important, to whom, its parameters, who may be impacted, and the consequences of inaction or consequences of action. Questions about the group's process enhance self and team awareness and learning about leadership – how we're working together, individual contributions, and participation. Done well, this type of inquiry enables the group and its members to employ creative methods of data gathering, interpretation, introspection, and decision making that contribute to a transformative learning experience.

***We had the  
experience but  
missed the  
meaning.***

***-T.S. Eliot***

Paradoxically, a team that takes time away from focusing on delivering results to reflect on its process and assumptions is actually better equipped to find better solutions, and attain better results, than a team that focuses solely on the work to be done.

### ***Case Example from US Fish & Wildlife Service***

*"The practical learning experience enables participants to acquire specific skills and competencies desired by the organization, such as problem-solving and team-building, while also developing leaders. Action learning enables the individual to practice academic theory while increasing personal self-awareness and confidence through the process. The individual . . . may also benefit from increased visibility and interaction with senior leadership . . . Unlike a work task force, the [team's] solution to the organization problem is secondary to learning from the process, interaction, and each other." Stieglitz and Wicks (2003)*

# The Art of Inquiry

Listening – Asking Questions – Reflecting

# Powerful Listening

*Listening is the beginning of all knowledge. - Plato*

## What is It?

Powerful listening involves the capacity to see the world as another sees it, and thus avail ourselves of another's perspectives, experience, creativity, motivation, and wisdom. It comes in three parts: 1) taking in fully what the other person means; 2) relating to others in ways that demonstrate that you 'got it;' and 3) being open to the new possibilities that this perspective may offer.

### Powerful Listening

*'I get what you're saying and have a way of interacting and being with you that let's you know that – and through this I may change my perspective or actions.'*

## Why Use It?

A 1989 landmark study entitled "Listening, Communication Abilities, and Success at Work" in The Journal of Business Communication ends with this statement:

*"What we can conclude from this study is that listening is related to success at work. Better listeners held higher-level positions and were promoted more often than those with less developed listening abilities."*

Further, in today's world of rapid and discontinuous change, it is the leader who can extract value and possibilities out of every conversation who will have more options for addressing the increasingly complex challenges we face in our organizations and in society as a whole. Albert Einstein put it well when he observed: "The current problems we face cannot be solved with the same level of thinking which created them."

Einstein's point calls upon us to engage the very best that everyone in our organization has to offer. Powerful listening is a prime tool for doing that.

## When Do I Use It?

- Powerful listening is the way to listen when our intention is to "Seek first to understand, then to be understood."
- Powerful listening is the way to listen when we want to build a culture of respect, empowerment, and continuous learning.
- It is the way to listen when we want to capitalize on all the perspectives, experience, creativity, motivation, and wisdom resident in our workforce.

## How Do I Use Powerful Listening?

In his book, *Dialogue and the Art of Thinking Together*, author William Isaacs recalls a manager saying to him, “You know, I have always prepared myself to speak. But I have never prepared myself to listen.”

This observation contains the first challenge many of us face in becoming better listeners -- being aware of how we’re listening now.

The Indian poet, Krishnamurti, put the challenge this way:

*“I do not know if you have ever examined how you listen, it doesn’t matter to what, whether to a bird, to the wind in the leaves, to the rushing waters, or how you listen in a dialogue with yourself, to your conversation in various relationships with your intimate friends, your wife or husband.*

*If we try to listen we find it extraordinarily difficult, because we are always projecting our opinions and ideas, our prejudices, our background, our inclinations, our impulses. When they dominate, we hardly listen at all to what is being said. In that state there is no value.*

*One listens, and therefore learns, only in a state of attention, a state of silence, in which the whole background is in abeyance, is quiet. Then, it seems to me, it is possible to truly communicate.”*

Krishnamurti offers us a picture of the state for powerful listening -- one of attention, inner silence, “in which the whole background is in abeyance...”

Isaacs adds the importance of listening without resistance, or more precisely, “listening *while noticing* our resistance.” The challenge here is to become conscious of the ways in which we push back on what we are hearing when it is not agreeable to us or does not conform to how we see things. We do that by judging what we’re hearing, distorting what is being said without even realizing it, discounting it outright, or by projecting our opinions of the speaker onto them. This process well describes the defensive routines articulated in Argyris’ Action Science writing.

The authors of *Listen to Win -- A Guide to Effective Listening*, Curt Bechler and Richard Weaver, offer these questions for us to assess how we listen now:

- Do I choke off an employee’s conversation to ask questions? To correct what he or she says? To tell him or her my views?
- Do I brush aside another’s arguments because I know I’m right?
- Do I frequently have to backtrack because I’ve misunderstood information or instructions another person has told me?
- Am I quick to label a conversation or speaker as dull or boring?
- Do I tend to squirm or fidget while others are speaking?
- Do I ‘know’ what other people are going to say before they say it?

- Do I listen for the other's feelings as well as the content of their message?
- Do I 'multi-task' (check email or text ) while listening?
- Do I prefer talking to listening?

To change our habits, we need two things: a picture of what we're striving for and some practical steps for getting there. Isaacs and Krishnamurti have offered us the picture. Practical first steps come from Peter Senge and his co-authors of the *Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*.

### **How to Listen Powerfully**

1. Stop talking - to others and to yourself. Learn to still the voice within. You can't listen if you are talking.
2. Imagine the other person's point of view. Picture yourself in her position, doing her work, facing her problems, using her language, and having her values. If s/he is younger or more junior, remember your own early years.
3. Look, act, and be interested. Don't read your mail, doodle, shuffle, or tap papers while others are talking.
4. Observe nonverbal behavior, like body language, to glean meanings beyond what is said to you.
5. Don't interrupt. Sit still past your tolerance level, the point when you would normally speak.
6. Listen between the lines for implicit meanings as well as the explicit ones. Consider connotations as well as denotations. Note figures of speech. Instead of accepting a person's remarks as the whole story, look for omissions -- things left unsaid or unexplained, which should logically be present. Ask about these.
7. Speak affirmatively while listening. Resist the temptation to jump in with evaluative or critical comments at the moment a remark is uttered. Confine yourself to constructive replies until you can offer criticism without blame.
8. To ensure understanding, rephrase what the other person has just told you at key points in the conversation. This is the old 'active listening' technique, but it really works.
9. Stop talking. This is first and last, because all other techniques of listening depend on it. Take a vow of silence once in a while.

***Listening is the most underdeveloped leadership skill.***

Peter Drucker

*Adapted from the Federal Executive Institute, U. S. Office of Personnel Management.*

# The Art and Practice of Asking Good Questions

## What is It?

Questioning is a process used to uncover new information and insights about a significant issue, problem, or opportunity. We have all asked questions since we first demanded to know “why?” as children, but developing the ability to question effectively in an organizational or leadership setting requires a higher level of skill.

## Why is It Important?

The more we understand a situation, the more choices we have before we act. The more choices we have, the more freedom of action we have as leaders. Questioning thus expands our choices and freedom of action. As Emile Chartier, a French philosopher once said, “No one is free to implement an idea he has not thought of.”

## When Do We Use Questioning?

Questioning is used throughout the action learning or problem solving process, from the initial stages of framing the problem itself to the later stages of deciding how to implement a chosen action. Questioning is most powerful in the early stages of the problem solving process; however, it is in these early stages that questions will direct the gathering of data and the redefinition of the problem. Getting the correct definition of the problem is crucial to all later stages of the problem solving effort. If you define the problem wrongly, it doesn’t matter how well you implement the solution!

## How Do I Use Questioning?

Using questioning effectively requires both a questioning *mindset* and questioning *skills*. The questioning mindset, aptly described in the table below by Marilee Goldberg, is one of approaching an issue as a learner not a judger. As a learner, one seeks to open possibilities and approach the issue without preconceived judgments.

Judger	Learner
Automatic	Thoughtful
Knows it already	Beginner’s mindset
Judgmental evaluator	Unbiased observer
Thinks “either-or”, “right- wrong”	Thinks “both-and”
Oriented towards rejection, defense, attack	Oriented towards acceptance, recognition
Assumes possibilities limited	Assumes possibilities unlimited
Win-lose	Win-Win

As you intentionally differentiate between open-ended (learner centered) and closed-ended (judger mindset) questions, you'll discover that the information you're getting is much broader which allows you to see what previously you may have missed.

Some sample types of questions:

Type of Question	Example
Reflective	"You said... What leads you to think that?"
Probing	"Where do you think the bottleneck is occurring?"
Clarifying	"Could you explain a bit more?"
Feeling	"How are people feeling or reacting to this?"
Analytical	"Who else could help with this?"
Consequences	"What are the consequences of doing that?"
Assumption Surfacing	"What assumptions are governing how you look at this?"

**"If I were informed that the world was in danger of coming to an end in 60 seconds, I would spend the first 59 seconds formulating a question and the 60th second answering it."**  
**Albert Einstein**

*Adapted from the Federal Executive Institute, U. S. Office of Personnel Management.*

## Questions for the Phases of Action Learning

### Action Learning Principles

- How does everyone understand the principles of action learning?
- What is our team's balance between questions and statements?
- Could you turn that into a question?
- Is this the right question? What might be a better question?
- How closely does this team reflect the six ideal action learning components?

### Reflection and Learning

- What have I learned about myself? About leadership? About organizations?
- How do we balance task and process, action and reflection, work and learning?
- What do we want to keep doing? Do less of? Do more of?
- What are the most significant lessons you learned on this team so far?
- How do we share what we've learned in our work together? For future groups?
- How can members and the team improve?
- How can our learning be applied to ourselves and our organizations?

### Reframing the Problem

- Do we have clarity and agreement on the presenting problem?
- Is the deliverable doable within the time constraints of the agreement?
- How has the presenting problem been analyzed?
- Were the issue's underlying assumptions challenged?
- How does my mindset influence the data that I see? My decisions, my results?
- How might I expand how I see myself, this problem, this team?
- How creative are we? How can we increase creativity? What's in our way?
- What is the quality of our questions? Our ideas? Our strategies?

### Action and Decision Making

- What action will each member take between now and the next meeting?
- How do we handle conflicts? Who helps to resolve them, in what ways?
- Do we have a clear decision process? Do some make decisions individually?
- Does the majority rule, leaving some out? Attempts made toward consensus?
- How are we progressing toward our goals? Are we on track?
- Who makes suggestions to move things forward? Who helps to summarize?
- Who seeks facts, ideas, opinions, feelings or alternatives? Who prompts focus?



**Member Participation**

- How well do members get their ideas across? How are new ideas received?
- Who encourages others' participation? How do they or could they, do this?
- Who has participated most in this meeting? The least? Why?
- How are the silent people treated? How is their silence interpreted?
- Are subgroups forming? Are these helpful or hindering?
- What do you see, hear, and feel about the group and its individual members?
- Who exerts strong leadership in the group? How? How do others respond?
- Who moves ideas forward? Who is a peacemaker? What other roles exist?

**Group Dynamics**

- What did we do well? What could we have done better?
- What stage of the life cycle is the group in? How is that impacting this group?
- Are we having fun yet? What would bring more joy to our team's work?
- What does the group's body language say? What's the predominant emotion?
- How well are we at sitting in the unknowing and managing our action anxiety?
- Are we keeping busy, feeling productive – working on the wrong things – because we have managed conflict or agreement poorly?
- What are the group's norms, patterns and culture? Do we trust each other?
- What are our ground rules? Are they followed? How are expectations shared?
- Are members respected? Supported? Valued? How is that conveyed?
- Did the group consider or encourage divergent points of view?
- What have we learned about teams?

Adapted from Action Learning in Action: Transforming Problems and People for World Class Organizational Learning. Marquardt (1999)

## Reflecting

### What have you learned?

Take time to step back from the action, think about what happened and what's going on with you. Make some notes to yourself regularly in your journal. Review these notes occasionally and see what patterns or themes emerge. Extract learning from this and summarize it. Use this learning in your day to day. That's how learning and change happen. Try it!

The questions below can serve as prompts for your reflections and learning. Use them in your journal, put the grid on your computer and make entries regularly. Find a way that works for you and stick with it. After a while, you'll be amazed at what you see.

*What have I learned about my self?*

*What have I learned about leadership?*

*What have I learned about organizations & complex systems?*

*What have I learned about change?*

Topic, Background, Discussion, Source
Learning About Myself:
My Role in the Group:
<b>TEAM STRUCTURE</b>
Membership:
Project Agreement:
Roles on the Team:
Ground Rules:
<b>LEARNING GOALS</b>
My Individual Learning Goals:
Team Learning Goals:
<b>PROJECT</b>
Project Management:
Project Progress:

Topic, Background, Discussion, Source
<b>TEAM'S LIFE CYCLE</b>
Forming:
Norming:
Storming:
Performing:
Transforming:
<b>SPONSOR</b>
Relating Effectively with an Executive Sponsor
<b>COMMUNICATION</b>
Email or Website:
Teleconferencing:
Meetings:
<b>PROCESS</b>
Question and Reflection:
Team Coach:
Evaluation and Debrief:
<b>DELIVERABLE</b>
Project Goal:
Project Deliverable
<b>GUIDANCE</b>
Action Learning Guide, Training, Webpage:
<b>OTHER</b>

# Meeting Facilitation

## Agenda Planning

Meetings are generally occasions when people gather to make decisions and take action to accomplish specific goals. Good meeting ingredients include well understood goals, a clear process for reaching those goals, sensitivity to people's needs and ways to engage those present. Ideally, agendas are created with good input from group members.

*Time is precious – time in groups is even more precious – making our time together productive is critical*

### Sample Agenda

#### Gathering Time

Members socialize, check-in with each other.

#### Welcome and Introductions

Start on time! Acknowledge new people. Do a check-in or other brief activity to get people focused and connected. Assign roles as facilitator, coach, timekeeper and recorder.

#### Agenda Review

Pass out written agenda or post on flipchart. Give each item a time and/or amount of time. Negotiate changes or additions to the agenda, and adjust times accordingly.

#### Reports

Start with a review and approval of last meeting's minutes.

Keep reports very short, or distribute written reports ahead of time.

#### Main Items

Clarify agenda items that need decisions today, or just discussions. Don't try to do too much -- this is a constant struggle! Discuss most important items first, set priorities. Keep focus on the agenda and encourage participation by all.

Before time is up, close discussion and start decision making. Review decisions made and action steps needed: who will do what, by when.

**Break** In long meetings take time to stretch, rest, and move around.

#### Next Steps

Choose next meeting date, time and place, and assign next meeting's roles.

#### Announcements

Try to distribute in writing instead.

#### Evaluation and Coach Questions

Question what went well and suggestions for improvement at next meetings.

Share what we learned about our selves, about leadership, about organizations.

#### Closing

Acknowledge accomplishments and end on time

#### Adjourn

## Meeting Evaluations

Continually monitor progress, make ongoing improvements and re-evaluate. Learn from your mistakes and your successes. Use these tools to help you evaluate:

**Start-Stop-Keep:** What do we want to start doing – stop doing – keep doing?

**Effectiveness:** Use a scale of 1-10 – how well did we do today? How would you rate your/our level of engagement?

**T-Bar:** What went well (+) – what would we change ( $\Delta$ ) for future meetings.

### Before the Meeting

Always build an agenda before the meeting with input from others on the team. Estimate the time needed for each item and weigh its importance. Plan who to invite. Remind people about the meeting, time and place. Arrange to have different people present each item on the agenda.

Prepare agenda, minutes, reports, flipcharts and markers, other materials needed. Have proposals for decisions written or thought through in advance. Set up the seating arrangements. Arrange refreshments for long meetings. Prepare the meeting space – set the stage for positive group dynamics.

### During the Meeting

Start on time! Keep the discussions relevant to the agenda items. Urge people to be brief and specific, but hear everyone out. Draw out those quiet folks. Record who will do each task and when it will be done. Pay attention to the emotional tone of the meeting. Learn to have better meetings through evaluation and feedback.

### After the Meeting

Wind down, socialize and enjoy each other. Check in with people to find out how they're doing.

### Planning Prevention

Planning prevents the following: reviewing information that could better be covered in a memo; rehashing old problems and opening 'gripe' sessions; addressing a subject of concern to a very few of the people present; allowing a few people to monopolize the meeting; failing to work from a written agenda; frustration of not meeting your goals; and unnecessary meetings. A meeting is no substitute for progress.

## Meeting Roles

Highly effective teams balance task and process well. Task roles include getting the job done, sticking to an agenda, keeping time during the meeting, and getting the minutes out. These are important but the team glue is in the process roles: seeing that everyone participates, supporting members, and looking for common perspectives. This takes a high degree of emotional intelligence, skill and experience on the part of all team members. These roles may be formally defined or unspoken, consistent or fluctuating, or some combination depending on the group. Typical roles on an action learning team include:

- **Facilitator** (Task and Process)

Facilitators accept a special responsibility to help the group accomplish common tasks – but to do so using a participatory and respectful process. They help the group move through the agenda in the time available, make the necessary decisions, and plan action on those decisions. This is a powerful role in any group – the leader's choice of words, use of body language, and other presentation techniques have a dramatic impact. An effective leader uses many techniques to help the group work effectively. The more people within a group that develop facilitation skills the more effective the group will become. Intentionally learn, teach and practice leadership skills with as many members of your group as possible.

- **Coach** (Process)

Action learning teams agree to have a coach assigned at every meeting to focus on process issues and to help the group reflect upon how they work together. This person is empowered to ask questions during the meeting to focus on the group process and help the group reflect on its progress, relationships and way of working together. The coach role is critical and each team member should rotate through it over time.

- **Recorder** (Task)

The recorder summarizes key issues, decisions and next steps. They record the assignments, deadlines and other details of each decision, as well as the next meeting time and place. They take responsibility to distribute the minutes and notice for the next meeting.

- **Timekeeper** (Task and Process)

The timekeeper keeps time and informs the group when time has expired and suggests that the discussion stop so that a decision can be reached. The timekeeper also keeps things on schedule, or makes sure the group contracts for time changes on the agenda before going further.

# Decision Making



## A Decision Making / Problem Solving Model

- **Define the Issue/Challenge:** Note goals, challenges, and prior attempts.
- **Reframe the Problem:** Challenge assumptions to clarify why it is important and to whom, who else is impacted and how, and reexamine the scope of the problem
- **Gather Information:** Identify key stakeholders, gather data, explore and test assumptions and values – then re-frame or redefine the issue based on this input
- **Identify Important Criteria:** Criteria you might use to evaluate and prioritize alternatives including cost, feasibility, importance, time constraints, suitability, flexibility, impact, ethics, organizational culture or other factors.
- **Develop Alternatives:** Brainstorm a variety of alternative solutions
- **Select Best Alternative:** Weigh advantages and disadvantages of alternatives based on above criteria in cooperation with stakeholders as appropriate and try to predict unintended consequences
- **Clarify the Solution:** Develop specific plan and timeline with measurable outcomes, inform stakeholders, and compromise as needed.
- **Implement the Solution:** Implement the plan as effectively as possible.
- **Monitor Progress:** Establish process and procedures to evaluate specific and measurable outcomes during preplanned timeframes.
- **Review and Learn:** Evaluate results based on experience thus far, reconsider alternatives as needed

## Participatory Decision Making

Participatory decisions are typically better than those of the lone genius. Decisions usually start with a divergence of opinions, and ideally end with a convergence of thought. The middle point, known as the groan zone, is often frustrating. Negotiation is an art form that can help us to get to better decisions while building support for implementation. Involve the team and stakeholders in discussions. Encourage dissent and critique. Your final decisions will be stronger, and your team will be much more likely to own and support your final verdict.

- **Polling:** Often used in multiple rounds to test ideas and drop those that have less support – ultimately getting to the critical few
- **Weighted Primary:** Cost-benefit analysis of the best options
- **Autocratic:** Leader makes the decision
- **Consultative:** Leader decides after seeking input
- **Consensus:** All agree to go along, can 'live with it,' given the alternatives
- **Unanimous:** Members are in absolute agreement
- **Majority Vote:** Majority wins, but clarify the quorum needed for decisions

### Engagement Strategies: getting input, building support

- Write individual notes first - before sharing aloud in the group.
- Break into small groups for part of the discussion.
- Set aside specific time to challenge the ideas of the leader.
- Have the leader speak first or last, before or after hearing other's perspectives.
- Ask the leader to leave the room or not attend a specific meeting.
- Submit comments anonymously - possibly from a wide variety of stakeholders.
- Go around the room asking each person to speak to the issue.

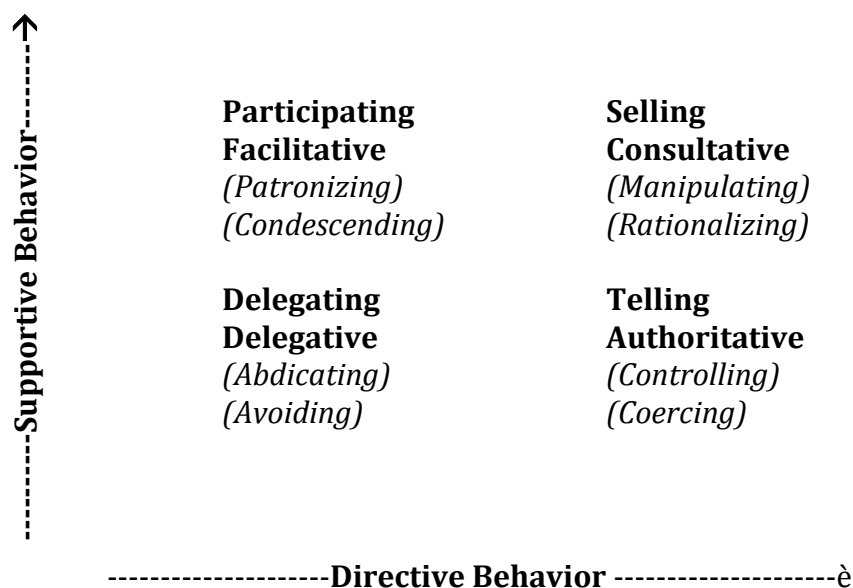
## Decision Questions

Clarifying the decision making process and developing decision rules can provide structure and logic, giving greater credence to the final decision and enhancing support during implementation.

- **How** do we make decisions? Who decides? What is a quorum?
- **What** (exactly) did we decide to do? (be specific)
- **Why** are we doing this? (relates to your mission and goals)
- **How much** will it cost? (time, money energy)
- **Who's responsible** for doing it? Who will do which parts of the task?
- **When** will it be started, completed? (times and dates)
- **How will we evaluate** it to determine if we were successful?

## Decision Making Styles

People and groups fall into a range of decision making styles, each relevant to different circumstances. The most appropriate style depends on the readiness level of the group involved, and the ideal is to match styles between the leader and group. Mismatches can result in the negative labels (noted in parenthesis) in the following chart. Urgent crises are often resolved using the most authoritative style.



# Engagement Strategies

# Stakeholder Mapping

## What Is It?

The purpose of Stakeholder Mapping is to identify groups and individuals inside and outside the organization that have an interest in, can affect the outcome, or will be impacted by the outcome of efforts to address a business issue. The more complex or emotionally charged the issue, the more important it is to conduct a rigorous stakeholder engagement process.

A robust stakeholder engagement process will identify:

- Different interests in the issue or challenge,
- Who supports or opposes proposals for change,
- Who has the power to approve, implement or block action
- What coalitions or interest groups exist

## Why Use It?

Getting things done invariably requires the support of others. Action that seems promising can easily flounder when unanticipated opposition appears or when critical support does not materialize. John Gardner, former Secretary of the Department of Health Education, and Welfare, used to say that the problem with change in organizations is that “for everyone who can say ‘yes,’ there are 100 people who can say ‘no.’” And, many of the ‘yes’s too often stay silent!

Stakeholder mapping is a way to identify potential supporters and opponents early in the process of change so that you can allow them to define and shape solutions and gain support for implementation by building a change strategy that addresses their concerns.

## When Do I Use Stakeholder Mapping?

Use this tool early in your Community Based Projects to “map” out the territory, identify the key players and engage them. As you do this, you will learn from many different perspectives which may well cause you to re-frame your topic or approach leading to a more effective solution or a more workable approach. Avoid this step at your peril.

Begin by asking questions like:

- Who cares about the issue or challenge in question? Who will it impact?
- Whose support will we need and how best do we get them interested?
- Who might be an opponent? Why?
- What are the relationships between various stakeholders on this issue?
- How can I build a powerful coalition to support change?

## How Do I Do Stakeholder Mapping?

There are three steps:

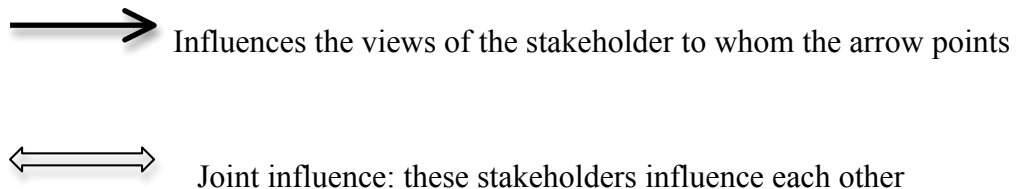
### 1. Create the Stakeholder Map

The stakeholder map with concentric circles a few pages later in this document suggests that every stakeholder can be mapped according to the degree of power or influence they are likely to have on your efforts to successfully resolve your business issue. The circle closest to you includes those individuals and organizations that have the power to approve or veto aspects of your change effort. The next circle includes those who have influence over others but can't themselves give you the go ahead or stop you. The final circle includes those who might get engaged in one of the two first circles but for now are only interested observers at best – who do not see any of their vital interests at stake at present.

Thus, the concerns of those inside the first circle are the most important for you to address, followed by those in the second circle. Those in the third circle may be important either in keeping them uninvolved or in drawing them in if you need additional support for your efforts. They will become engaged only if their interests are addressed or threatened in some way.

Using the concentric circle map, put the name of the individuals or organizations that care or might care about your business issue in the appropriate “circle of influence.” Use the key people's names if they are central and organization names when they're relevant. Consider people and organizations in all segments of society that have or might have a vested interest in the topic. Be as specific as you can at this point.

Next, draw an arrow between any individuals and organizations on your map (crossing circles wherever necessary) using the following legend:



### 2. Identify Stakeholder Power, Interests, and Coalitions

Next, write every name in circles 1 and 2 of the drawing on the left hand column of the Stakeholder Mapping Chart. These are the stakeholders you want to address. (You can include those in circle 3 later if you wish to deepen the analysis.)

Under each heading in the chart, respond as follows:

**Power:** Power is divided into two areas: approval and implementation. It is helpful to distinguish between the two. A given individual or organization might have a lot of power over whether you can get approval to do something but little power over how you go about implementing it. Conversely, another stakeholder, such as a group of employees, might have little power over whether the change is approved but considerable power over implementation - if active support is needed to make it work. Some stakeholders will have power over both, and some power over neither. Use the following scale to indicate the power of each stakeholder over approval and implementation:

++	=	Very Powerful
+	=	Powerful
	=	Not Powerful

**Interests:** In the space provided, write what the *interests* of this stakeholder might be in the business issue you are addressing. It is important to distinguish here between what their interests are and what position they might take on your issue.

Positions: A statement of what someone *wants* - "I want this program in my office."

Interests: A statement of the basic *need someone seeks to address* - "I have lost too many staff and funds already. My credibility and effectiveness as a leader are in jeopardy if I don't get this program assigned to me."

Often, people harden in defending their position. But, if you can uncover their true interests, you may be able to craft a solution that meets their interests – and thus find them willing to change their position to support.

Once you have identified each stakeholder's interests, make a rough estimate of whether the stakeholder is likely to favor or oppose the changes you have in mind. If it is too early to make this assessment leave this blank. You can always return to the analysis later on.

Use the following scale:

++	=	Strongly Favor
+	=	Favor
0	=	Neutral
-	=	Oppose
--	=	Strongly Oppose

**Likely Coalitions:** Stakeholders, including you, increase their power and influence by forming coalitions. Using your stakeholder map chart at the end of this

document, fill in the appropriate columns in the chart to indicate: (a) who influences each stakeholder and (b) who they influence. Keep in mind that there may be people or organizations that influence key stakeholders who are not shown in the concentric circle stakeholder map. Indeed, finding out who these others are may be central to influencing the stakeholders you have identified.

### 3. Devise Strategies to Increase the Chances for Success

Use your completed Stakeholder Map drawing and chart to identify strategies to move ahead in addressing your business issue. Consider the following questions:

- Identify those who are powerful and may oppose. How can you draw them in and increase the chances they will help you - talking to them, uncovering their needs, building their needs into your problem resolution?
- Identify those who will be impacted and how much.
- Are there some who might favor the change but are not particularly powerful? Is there a way to build their power - sharing information, building them into the change implementation effort?
- How can those with the most power and who are likely to be the most supportive be used to bring about change? How do you make sure you retain their support?
- Looking at all the interests displayed, especially among the powerful stakeholders, are there commonalities that might suggest coalitions you could develop? Are there striking differences, which would suggest the need to find some common ground or at least prepare for conflict?
- Are there stakeholders who are not likely to be engaged at present that you would like to become more active? How can you achieve this?

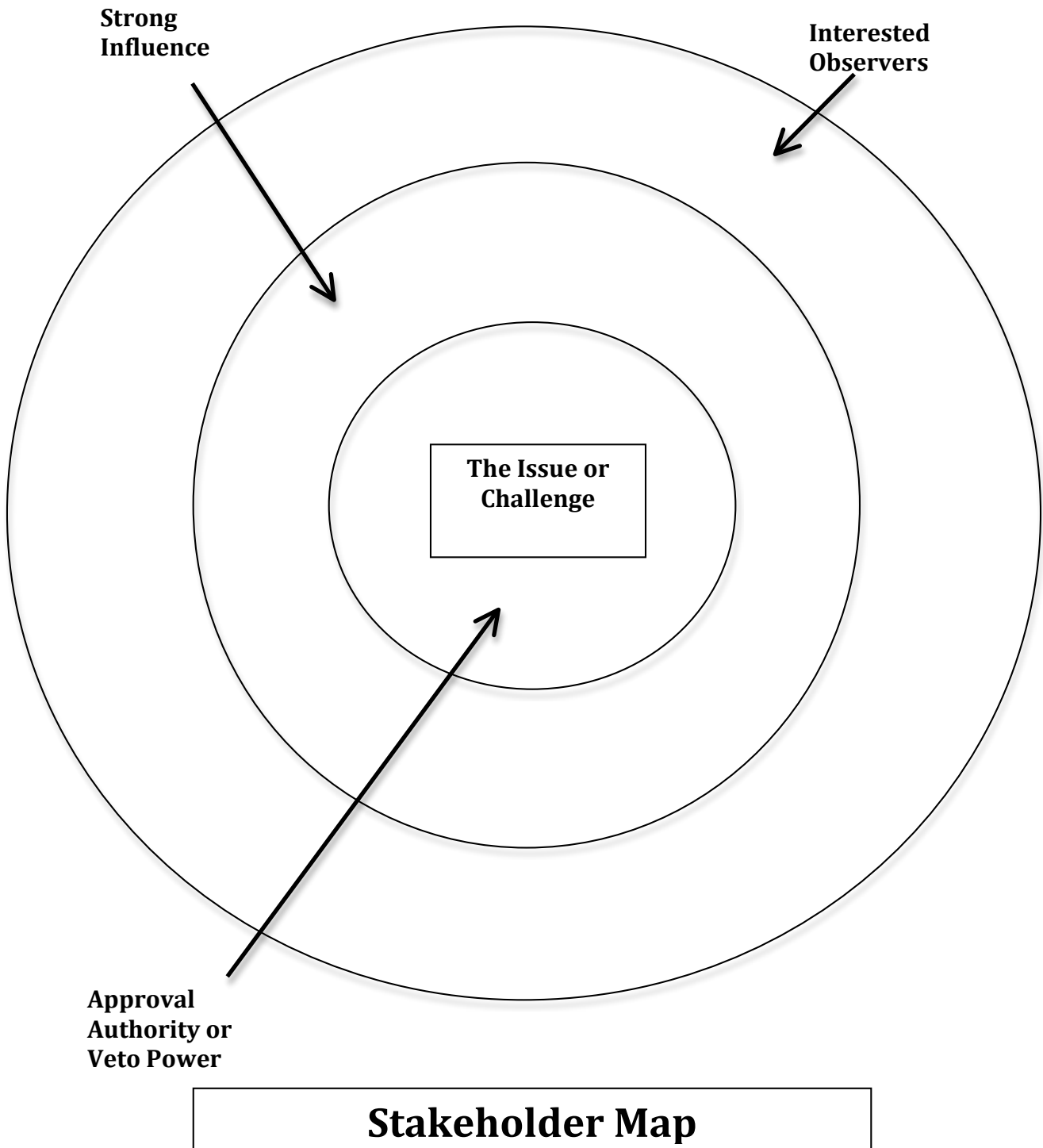
### What If I Can't Answer All the Questions In the Stakeholder Map?

At the early stages of your work on the business issue, you might have significant gaps in your Stakeholder Map. Your analysis may thus suggest the need to gather more information to identify who the stakeholders are, what their interests are, etc. It is thus an excellent idea to return to your stakeholder map from time to time to assess its accuracy, identify changes you need to make in it, and use the revised map to generate new opportunities for action and learning.

**References** - This tool is based on work done at The Wharton School, University of Pennsylvania, by Dr. Larry Hirschhorn.

*Adapted from the Federal Executive Institute, U. S. Office of Personnel Management.*





**STAKEHOLDER MAPPING CHART**

Stakeholder	Power Over		Interests	Favor or Oppose	This Stakeholder	
	Approval	Implementation			Influences	Is Influenced By

## **Leadership Dialogue**

### *A Stakeholder Engagement Strategy*

**Setting up the Dialogue:** Get clear on what you want to focus on during the leadership dialogue and who is relevant to bring into the conversation.

- What challenge or opportunity do we want to explore?
- What's our goal or outcome for the dialogue?
- What is our perspective on this issue – how do we understand it?
- What is our contribution to this issue – by omission or commission?
- Who is affected by this issue – who owns it – who cares about it - who should we invite?

**Convening the Dialogue:** Invite a group of stakeholders who have an interest or perspective on the issue – multiple levels, functions, roles and perspectives to develop clarity.

- Explain the purpose and goal of this leadership dialogue
- Frame and present the issue you've identified
- Ask: How do you experience this issue?
- Ask: What is its impact on you, your work, others around you, and your ability to be effective?
- Pay attention to the patterns and themes that emerge.

**Summarizing the Dialogue:** Gain agreement on the themes and patterns that emerge from the conversation.

- What patterns do we see?
- What do we want to pay attention to?

**Planning for Action:** Identify actions you want to take and gain agreement on any relevant next steps

- What actions does it make sense to take?
- Who should be involved – are others needed?
- Who will lead this?
- Next steps...

**Reflecting on the Process:** Explore what you've learned from the dialogue and determine how you'll use this going forward.

- What do we take away -- about ourselves, the organization, how we work, what it takes to get things done in this culture...
- Based on this, what do we want to do differently process-wise next time?

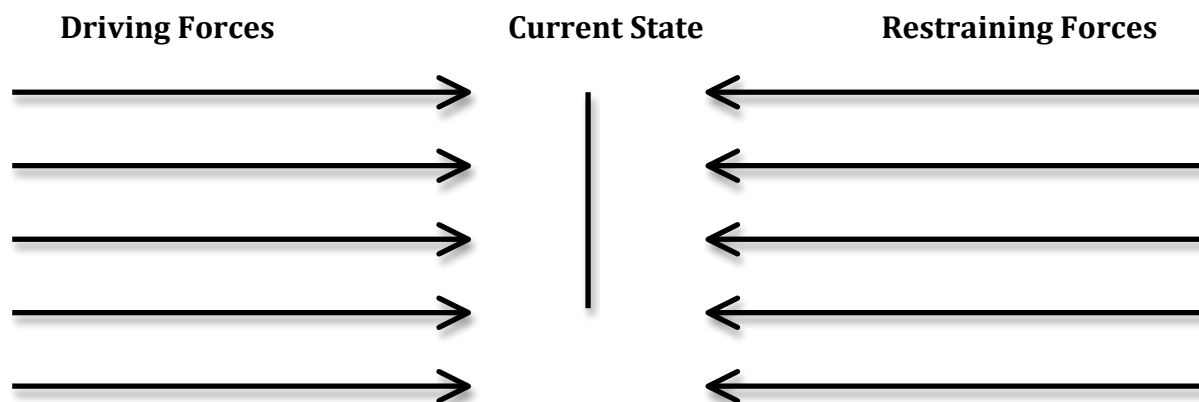
## Force Field Analysis

### What Is It?

Force Field Analysis (FFA) is a method of analyzing a situation to determine how one might best bring about change. FFA was developed in the 1940s by sociologist Kurt Lewin and can be used by individuals or groups seeking to bring about change.

### How Do You Use It?

FFA is based on the concept that a situation (personal or organizational) at a given point in time exists in a state of equilibrium – or status quo. This status quo (illustrated below) exists because two sets of forces – called Driving Forces and Restraining Forces – balance each other preventing any movement or change.



1. Identify the situation you wish to analyze and describe the current state in the box in the middle of the FFA worksheet
2. Identify the change you would like to see -- the goal you are after -- in the current state. Write this goal in the box on the right of the worksheet.
3. Identify existing forces that are helping bring about the desired change – that are **driving** change in the desired direction. List each driving force on a separate line on the Driving Forces side of the worksheet. Draw the force vector (→) so as to represent the strength of the force. (That is, the stronger the force, the longer the arrow should be.)
4. Identify existing forces that are hindering change – that are **restraining** movement in the desired direction. List each restraining force on a separate line on that side of the worksheet. Once again, draw the force vector to represent the strength of the force.

5. At this point, you should have all of the forces identified. Now you must decide how you wish to bring about change. Since the current situation represents a state of equilibrium, you can only bring about change if you make a change in the force pattern. You have three choices. You can do any one or all of the following:

- Increase the strength of one or more of the Driving Forces,
- Decrease the strength of (or remove) one or more Restraining Forces,
- Add one or more new Driving Forces.

The theory and practice of FFA suggests it is often more productive to decrease or remove a restraining force than to increase a driving force. The rationale is that increasing a driving force often leads to a corresponding increase in an opposing restraining force. By contrast, decreasing or removing a restraining force allows existing driving forces to push ahead with the change. For example, if a driving force to improve an employee's performance is the threat of formal personnel action for failure to improve and a restraining force is an employee's threat of taking action against the supervisor, increasing the threat may just increase the employee's resolve to file a grievance.

6. Once you have identified the forces you will seek to change, you can proceed with implementing the changes. If your analysis and implementation have been thorough, you should see movement in the desired new direction.

## **When Do I Use It?**

Force Field Analysis can be used to analyze and consider changes to address any personal or organizational problem. FFA can be a very effective tool for gaining a beginning understanding of why a problem exists and thus for directing one's further study of the problem. For example, does a supposed restraining force really exist and to the extent one thinks? Collecting data to test out one's assumptions about the restraining force may be a good next step. FFA can also be used to help brainstorm both possible causes of a problem and potential solutions.

*Adapted from the Federal Executive Institute, U. S. Office of Personnel Management.*

## Force Field Analysis

**Driving Forces (→)**

Current Situation

**(←)Restraining Forces**

Goal:

## Team Effectiveness Tools

## **Strategies for Stages of Team Development**

### **Strategies for the Forming Stage**

- Engage in lots of communication – talking & listening
- Build relationships by getting to know each other
- Reach consensus around ground rules
- Develop comfort with each other
- Clarify the team's charge – purpose, goals, authority, relationship to hierarchy
- Identify member skills – interpersonal, group, administrative, technical

### **Strategies for When the Team is Storming**

- Clarify who's responsible for what
- Revisit ground rules
- Negotiate relationships & roles
- Set up or modify administrative structures – planning, tracking...
- Ensure all members voices are heard
- Engage in group problem solving of the issues at hand
- Obtain clarity on boundaries of team authority & deliverables

### **Strategies for Norming/Performing Stage**

- Develop agreement on how we're going to work best together
- Set up dialogue to dissolve barriers and cliques
- Seek to understand other points of view
- Focus on the task not personality
- Re-focus on goals and our "higher" purpose
- Solidify group identity
- Set up plans and mechanisms to stay in touch
- Enhance member interdependence
- Engage in creative problem solving

### **Beyond Performing – Transforming**

- Develop ways to enhance performance
- Make time to answer "where do we go from here"
- Members coach each other in areas of expertise
- Plan to celebrate & adjourn if team is time-limited

Adapted from Tuckman, et. al.



## **Team Success Factors**

### **Purpose**

- Clear charter, goals and objectives
- Team members are aligned about purpose and outcomes

### **Process**

- Work plan with milestones and outcomes
- Agreements on how we'll make decisions, solve problems and get our work done

### **Communication**

- Members express themselves openly, honestly and clearly with each other
- Guidelines exist and are adhered to regarding communications outside the team
- Strategies for coordinating with other relevant teams or efforts
- Mechanisms exist to record agreements and action items

### **Involvement**

- Individuals engaged & participating fully
- Skills and talents are used to help the team succeed
- Balanced distribution of work

### **Commitment**

- Members accept responsibility and follow through
- Attendance is regular and good

### **Trust**

- Members confidently rely on each other to do their part
- Team uses differences in style and approach to produce results
- Differences are voiced, Conflict is surfaced, addressed and worked through

## Team Debrief

A final action learning team debrief can help to provide deeper learning for each member of the team and for the team as a whole. It can also provide closure and a way to celebrate the work of the team and individuals on the team.

### Self Reflection Questions

Team members are encouraged to ask and answer the following self-reflection questions before gathering for a final team debrief. Members are also encouraged to use a peer mentor to explore observations about themselves from another's perspective (see Appendix B. 12, *Peer Mentor*).

- What did I learn about myself as a result of this experience?
- How well did I interact with other members of the team?
- What challenges did I encounter and how did I handle them?
- In retrospect, what might I have done differently as a team member?
- What might I try to do differently in the future as a result of this experience?
- How did this experience contribute to my personal or career development?
- What future developmental needs were underscored from this team experience, and how can those developmental needs be met in the future?
- How could this have been a more constructive process for me?

### Team Debrief Questions

The self reflection and team debrief questions could be answered in writing prior to the team debrief to begin the process of reflection, but some of the answers might change as a result of the discussion by the team.

1. What do you feel was the single most important lesson that you, as an individual, learned as a result of this experience? What other lessons did you learn from this experience?
2. What other lessons do you believe the team learned from its experience? How closely did the team follow the six components and ground rules of the ideal action learning model, and how did that impact your work together?
3. How could what you learned from participating on this team help you in the future? Why do you think so?

Consider concluding the team debrief by allowing time for appreciations & celebrations.

## Community Based Project – Sponsor Guidance

The executive sponsor role is central to the team's effectiveness and the quality of learning about leadership that participants take away. This role need not take a lot of time. We propose the following ways of thinking about your role – that will minimize the time you spend with the team and maximize your impact and their effectiveness and learning.

### Sponsor Roles

- Support – help them gain access where needed, re-frame issues when they get stuck and see the bigger picture when the going gets tough.
- Advisory – share your experience and what you've learned along the way and give advice where it would be helpful.
- Accountability – request periodic, informal updates/briefings on progress and help ensure that their work is rigorous and progressing at a good pace.
- Challenge - assumptions and keep team focused on making their work strategic.
- Connect with Team Coach – coach will initiate occasionally to discuss team progress, sponsor impact and provide perspective.

### Important Dates for Sponsors

Team Charter sign off	Jun 30, 2013
Intensive team start up time – good time for sponsor to be in touch	June - August
Interim CBP SES Briefings – attend Oct or Dec when your team briefs	Oct/Nov 2013
Final CBP Project Briefings	Feb 19, 2014

## APG Senior Leadership Cohort Program Community-Based Project Description

<b>Project Title</b>	
<b>Accountable Executive (Sponsor)</b>	
<b>What is the Vision for the Project?</b>	
<b>What mission will be achieved?</b>	
<b>How it supports the APG Vision</b>	
<b>Measure of Success (what success looks like and how it is measured)</b>	
<b>Scope Statement</b>	
<b>What is the Strategy for the Project?</b>	
<b>Major Achievements or Deliverables</b>	
<b>Cohort Participant (Project Leader) Authority and Responsibilities:</b>	
<b>Key Stakeholders needed to Succeed</b>	
<b>Name of Person</b>	<b>Name of Organization</b>
<b>Potential Leadership Growth Opportunities for the Cohort Participant</b>	
<b>Executive Coach</b>	
<b>Cohort Director</b>	

### Approvals:

\_\_\_\_\_  
Signature of Organizational SES Sponsor

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature of Team Lead/Project Manager

Date: \_\_\_\_\_

*available electronically on the cohort doc shelf website*