Management Toolkit

Leading & Facilitating Teams

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Most classes are on Wednesday’s from 8:30 - 12:30
Consider the Leadership Actions you have completed since your last class experience, discuss the following:

1. What did you learn last week?
2. How have you applied the learning's back at your work?
3. What more do you need to do to apply class learning's?
Class Norms:

- Honesty & Candor
- Engaged
- Participation - (includes listening)
- Commitment to Learn & Share
- Confidentiality
- Phones, computers, delegate
- Be on time -- be here now
Today

- Decision making & meetings
- Decision making - A Model
  - Consensus decision making
- Project Planning Activity utilizing Consensus decision making
- Reflection on UCSD Manager’s Toolkit
- Goal setting, Action Planning
- Declaration of Action / Graduation
Decisions happen in Meetings:

Remember -- Characteristics of Effective Meetings

- Clear purpose, understood by participants
- Have the right people attend
- Participants receive the agenda prior to the meeting, & know what is needed to prepare
- Include realistic timing on the agenda
- Utilize the skills of a facilitator
- Objectives met and communicated
- Have a scribe take minutes & distribute
- Participants are accountable for action
PROCESS vs. CONTENT

All members manage both aspects of the meeting

Content

Process

What are we talking about?

How are we going about this?
CONTENT vs. PROCESS
GROUP DYNAMICS IN THE MEETING

The Iceberg Model

Meeting Leaders & Participants need to understand:
- Important dynamic, can’t control it, but can possibly manage it.

- Content
- Roles
- Decision Making
- Participation Patterns
- Feelings: How am I feeling about the group (obligations, pressures)
- Perceptions
Types of Meetings

Purpose for Holding Meetings

- Information Sharing
- Problem Solving
- Process Improvement
- Planning
- Feedback
- Decision Making
Effective Meetings
Handout Packet
Decision Making

- **Quality**: Technical Goodness of Decision
- **Acceptance**: Amount of buy-in & commitment for successful and efficient implementation
- **Time**: Amount of time it takes to make decision

**Goal:**
Maximize **quality**, balanced with minimal **acceptance** required in least amount of **time**
Decision Making

Better Quality
More Acceptance

Side benefits:
Collaboration
Loyalty

Leaders Skills:
Knowledge
Facilitator
Expert
Problem Definer

Decision Stages:
D1
D2
D3
D4
D5

Employee Influence:
Lo
Hi

Participation / Power Sharing:
Lo
Hi
FIVE DECISION-MAKING METHODS

- Unilateral (or Individual)
- Consultative
- Majority
- Consensus

Directing – D1
Fact-Finding - D2 & Investigating – D3
Collaborating – D4
Teaming – D5
Directing - Urgent, often made by manager without consultation. Often announced after the fact. Rely on your own expertise & judgment.

FAST!
FACT-FINDING & INVESTIGATING METHODS
2 Styles: D2 - D3

Fact-finding & Investigating - Manager retains authority for decision, though consults with others for information and input.

Quality, Buy-in, faster!
Fact finding & Investigating: 2 Styles
Both: YOU retain Decision Making Authority

Fact finding D2: Seek info from select individuals. Only solicit data, not suggestions or solutions.

Investigating D3: Consult with relevant individuals. Share the problem, solicit suggestions & input.
COLLABORATING METHOD

Collaborating - D4
Consult the group. Share the problem in group meeting. Discuss ideas, suggestions & alternatives. Manager makes decision.

Quality & Buy-in
TEAMING METHOD
D5

Teaming - Substantial agreement by the group required. Encourages disagreement in service of better thinking. Instills sense of teamwork, trust and commitment. Manager accepts team decision. Consensus!

Quality & Acceptance!
Decision Making

Better Quality
More Acceptance

Side benefits:
Collaboration
Loyalty

Leaders
Skills:
Knowledge
Expert

Facilitator
Problem Definer
FOUR STEPS OF CONSENSUS DECISION MAKING

- Step 1 - Prepare for the Decision
- Step 2 - Hold Team Discussion on the Topic
- Step 3 - Test for Consensus
- Step 4 - Make the Decision
STEP 1 - PREPARE FOR THE DECISION

Define the Topic so that members share a clear understanding and knowledge of what needs to be decided.

Gather background information and facts on the topic in order to make a competent decision.

Hold a team meeting to share information & exchange ideas and opinions on the topic.
STEP 2 - HOLD A DISCUSSION ON THE TOPIC

- Initiate Discussion via Round-Table Discussion
- Focus on Needs and Concerns, Not Predetermined Positions and Solutions
- Be Able to Articulate Criteria
- Put All Ideas Out on the Table (w/out criticism)
- Discuss the Pros and Cons of Each Idea
- Realize the Importance of a Facilitator
- Utilize Problem-Solving Techniques
STEP 3 - TEST FOR CONSENSUS

- Identify Majority and Minority Opinions
- The Person With the Minority Opinion Should Explain Why He or She Holds That Opinion
- A Person Holding the Majority Opinion Should Explain That Point of View
- The Prevailing Majority Position Should Have Another Test for Consensus
STEP 4 - MAKE THE DECISION

- Realize that a **Decision Is Worthless Unless Carried Out**
- Determine **Who Is Responsible For Carrying Out a Decision and How Soon the Task Needs to Be Accomplished**
- Ensure that **Sufficient Support is Provided to the Person(s) Assigned to Complete the Task**
- Consider how **formal the Team Should Be**
- Realize that **Some Decisions Are Less Important Than Others**
GUIDELINES FOR REACHING CONSENSUS

- Avoid Arguing for Your Own View
- Do Not Assume That Someone Must Win & Someone Must Lose
- Do Not Change your Mind to Avoid Conflict
- Avoid Conflict-Reducing Techniques
- Identify Areas of Agreement as You Go Along
- Test for Consensus
POTENTIAL
GROUNDRULES & NORMS

- Don’t interrupt when another participant is talking
- Acknowledge, paraphrase / clarify what the last person just said as appropriate
- Don’t criticize the ideas of others. Build on their ideas
- Remain open minded and non-judgmental
- Use consensus decision making
- Start & end the meeting on time. Capture additional topics for next meeting
- Everyone participates, no one dominates.
  - All team members are responsible for ensuring everyone has input
- Don’t hesitate to ask questions & Check your perspective.
- The facilitator is empowered to enforce ground rules
Averages

- Average Individual Score: 58.01
- Average Team Score: 31.05
- Average improvement: 19.61
- Best Individual Score: 32.06
- % of Teams scoring below AIS: 96%
- % of Teams scoring below Best Individual score: 84%
PROCESS vs. CONTENT

All members manage both aspects of the meeting

What are we talking about?

How are we going about this?

Content

Process
BENEFITS OF CONSENSUS

- Synergy
- Maximized interaction
- Discussion and challenge of all ideas
- Less emphasis on assumptions and more emphasis on fact
- Opportunity to resolve conflicts
BENEFITS OF CONSENSUS

- Strong acceptance and support for decisions; promotes commitment to implement
- Future decision-making ability of the team enhanced
- Opportunity to build and strengthen the team
DISADVANTAGES OF CONSENSUS

- Time-Consuming
- May Require a Great Deal of Skill and Psychological Energy
- Sometimes Impossible to Get Everyone to Agree
- Leader May Lack the Communication and Facilitation Skills Needed to Steer Group Toward Consensus
Delegation

Empowerment = Authority x Resources x Skills x Information x Accountability

Note: If any element is missing -- you are not delegating!
Goal Setting Process

- Consider current & near Term challenges at work
- **Reflection** on last 5 months - Identify key learning’s
- **Career Aspirations**
- Set 2 - 3 goals
- Detailed **Action Planning** on 1 goal
- Discussions with **Learning Partner**
- Declaration of **Intent**
Setting SMART Goals

- **Specific**: A goal statement should be as focused as possible. What exactly will I do? “Scheduling weekly meetings to discuss status on our project”, is better than “communicate more effectively.”

- **Measurable**: Without a way to measure your success, how will you know you have achieved it? When will I do it? How well do I want to do it? What will be the cost?

- **Attainable**: A goal should be within reach - a stretch - but not an impossible dream. If the goal is set too high, little progress is made which can be de-motivating.

- **Relevant**: A goal needs to be relevant - to be important enough to you and your situation that you are willing to expend the energy to achieve it. “Do I really want to achieve this and why is it important to me?”

- **Trackable**: A goal needs a timeline. Once you have determined what?, where?, when?, how?, etc., put an action timeline in your planner and stick to it.
Action Planning Worksheet

Goal: __________________________________________

Benefits: ________________________________________

Action Plan: ______________________________________

1. _______________________________________________

2. _______________________________________________

3. _______________________________________________

Timeline: _________________________________________

Obstacles: _________________________________________
Action Planning Worksheet

Goal: ________________________________

Benefits: ______________________________

Action Plan: ________________________________
1. ________________________________
2. ________________________________
3. ________________________________

Timeline: ________________________________

Obstacles: ________________________________