AGENDA

Session guide: Lead a team meeting to set goals and define measures

Date:

Time:

Location:

Attendees:

Contact:

Your preparation

To prepare for this session, you will need to:

- Look for any existing goals for your team or an existing division/branch business plan.
- Chat to your manager about their expectations for the session with your team. Check if there is any flexibility in existing goals (if there are any for your team) or room for creativity when determining specific actions. Also use this conversation to discuss the agency strategic priorities or division/branch business plan to get clarity on what it means for your team.
- Schedule the team meeting in a room where you can avoid interruptions. We suggest 60 minutes for this discussion.
- Ask your team to come to this meeting with their current understanding of their role and think about what works well and what could be improved. Have them come with a list down any practices that they want to start, stop and continue in relation to their immediate role. This initial activity is to assess the state of team members and gain knowledge about how clear they are about their roles and responsibilities and how confident they feel about carrying their work and any support that they would require. This could be returned to you for consideration prior to the meeting.
- Download the session guide and templates.
- Work through the activity yourself and think about how you personally would answer the questions, as this will provide a starting point for your team if necessary. Also, think about how the team may respond to each question. It will be important to think about where the team might stumble or struggle to move forward.
- Think about how you will facilitate the discussion. Use the facilitator tips in the session guide.
- Organise the materials for the meeting.

Session materials:

- Bring a copy of your team purpose statement (Microlesson 1 included guidance to facilitate a team discussion to define your team's purpose.)
- Source and bring a copy of your division/branch business plan (or priorities)
- Textas
- Post-it notes
- Blue tac
- Flipchart or whiteboard

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No	Item	Description	Facilitator tips	Time
1	Welcome and purpose	**Welcome** Explain the why, the how and the what for the meeting: • **Why?** The purpose of today's meeting is to set our goals for the next 6 months. When we are all working towards the same goals, we are more likely to make better decisions that put our customers at the centre. • **How?** Together we are going to think about our team goals to develop a team plan of our focus for next 6 months. • **What?** Coming out of this meeting, we will have an agreed list of team goals, success measures, and targets. We will then have a second meeting to develop our action plan.	Close the door just before you start the meeting. This helps to signal that you want to start. Show the why, how, what visually (e.g. on flipchart) so people can refer to this during the meeting.	5 mins
2	Group discussion	**Team priorities** • Display the agency purpose, your team purpose and the Division/ Branch business plan (or priorities) at the front of the room. • If this is the first time your team has seen the division/branch business plan (or priorities), explain them to the team. • Facilitate a group discussion about what the division/branch business plan (or priorities) mean for you as a team. • As a group, identify which division/ branch priorities/goals your team contributes to (directly or indirectly).	• Provide the opportunity to ask questions. • Ask people what resonates with them (that way they will summarise part of the plan that stand out to them). • Before you facilitate a group discussion, ask people to share their thoughts in pairs. This will help them formulate their own thoughts and creates safety for them to test their thinking before they share it with the whole group. • Respond with curiosity when people share. This will encourage others to share in the group discussions. • Capture notes on a flipchart so people can visually refer to that.	10 mins

3	Group work	**Team goals**
		• Explain that we will now define team goals in line with our priorities.
		• Create one flip chart for each of the team's priorities (identified in the session above).
		• Split the team into small groups (or work through the activity as one group if numbers don't allow for smaller groups).
		• Assign one team priority to each group. Ask the group to identify goals (approx. 1-3) for the team to deliver on that priority. Groups record their goals on the flip chart.
		  • When explaining the activity, provide an example of a goal for one of the priorities so everyone is clear on what you are looking for.
		• When groups are finished, ask each group to share their goals with everyone. To invite team discussion, ask:
		  • How will this goal support us to deliver on our team purpose and the division/branch priorities?
		  • How is this goal dependent on other goals? Or does it conflict with another goal?
		• Agree and refine the goals as necessary (you may need to consolidate or reduce the number of goals if necessary).
			• Small groups are a great way to manage different styles and personalities in the room. You can either let individuals form their own groups, or if you have some challenging team dynamics, you might like to allocate people to groups.
			• When small groups are working, walk around to each group to check if they are on track, answer any questions and provide encouragement.
				20 mins

4	Group work	**Measures of success**
		• Explain that we will now identify appropriate measures and targets for our goals to help keep us on track and enable us to see if we are making progress.
		• Use the material from this microlesson to outline some of the leading practice in defining measures and targets, including:
		  • SMART framework
		  • Use existing data to minimise data collection
		  • Minimise the number of measures
		  • Link measures to goals and purpose.
		• Split the team back into the same groups as the previous activity.
		• Groups should build on the goals they identified in the previous session and now identify SMART measures and targets for the goals they identified in the previous activity.
		• Some questions you could use to prompt the groups include:
		  • How will we know we have achieved our goals?
		  • What data and measures could we use to see progress?
		  • What stretch targets should we set for ourselves?
		• When groups are finished, ask each group to share their measures and targets with the team.
		  • Invite team discussion and refine measures as necessary.
			• Consider the needs and experience of your team to determine how much guidance you want to provide (some groups like to learn about the theory, others prefer to dive right in.)
			• Give examples where it makes good sense for your team to help them to understand what this looks like in your team
				20 mins

5	Close	**Summary** Explain the next steps: • You will take the goals and measures generated by the team, finalise them and test them with your manager to ensure they meet the division/branch business plan. • You may also like to discuss with your manager the possibility of these goals being recorded as part of your performance development plan. • At the next team meeting you will take these goals and measures and work together to develop a workplan which outlines the actions and responsibilities to deliver on these goals. • Thank everyone for their participation today – share that you hope today's session provided an opportunity for everyone to contribute to the focus and direction of the team for the next 6 months.	• Explain that you value their input, and you will take it away and finalise the plan. Let people know which next steps they can expect and when.	5 mins

Actions for you to take following session 1 (and before session 2):

- Review the goals and measures and refine as necessary. Cross-check that you goals consider different perspectives of performance and well defined (SMART) and collectively they are well-rounded (balanced).
- Test the refined goals and measures with your line manager to test that they support the division/branch priorities. Discuss any anticipated risks and inter-dependencies.
- Test the goals with other relevant people in your agency.
- Email the refined goals and measures to your team (make sure you explain the rationale behind any significant changes) and ask them to read it ahead of session 2 so they come to the meeting with a view on actions required to deliver.

Facilitator tips to effectively lead your team discussion:

- Prepare for the session by familiarising yourself with the content and materials – particularly the structure of the session and the tools and materials that will be used in that session (their purpose and how to apply them).
- Reflect on what content you really enjoyed in this module and how you might share that with your team.
- Emphasise to your team the importance of being actively involved in the session and encourage participation by all – if team members are quiet ask them questions to encourage participation.
- Use the session to agree to a set of team commitments through listening and supporting different staff ideas. This will be critical for ensuring all members of your team have buy-in with them.
- Avoid thinking that you need to do it all alone! Work with other people managers to help run the session for additional support.

Handling questions:

- If the group discussion begins to go off topic, remind the group of the purpose of the session.
- Allocate time outside of this session to follow up any issues in the 'parking lot'.