

# Global Leadership Team Business Planning at VSO

## The organisation

VSO is an international development organisation that works with and through volunteering, and other forms of bringing people together.

## The need

During a time of uncertainty over income and the potential implications for programmes and core funding, VSO's Global Leadership Team (GLT) needed to agree the organisation's positioning and overall direction of travel in preparation for the forthcoming corporate business plan and budget reviews. There were two key challenges for the process:

- To align different views and approaches within the existing strategic framework, thus reaffirming the mission and People First strategy
- Address 'burning platform' issues whilst avoiding getting into operational detail.

The team was led by Jim Emerson, who had been in post as interim CEO for 3 months, and included team members from the UK, Asia and Africa. The business planning day was the first time that GLT had met face-to-face as a new team.

Kathryn Gordon, Director of People Group and GLT member, commissioned Jacqueline Hill of J Hill Associates to support the design and facilitation of the meeting on the basis of her facilitation skills, her long-term relationship with and understanding of the organisation, and her ability to bring an independent, external perspective.

## What we did

Jacqueline and Katherine worked together to co-design the Business Planning meeting objectives and agenda. We consulted with GLT members throughout the design process to incorporate ideas, discussion papers and presentations, and to respond to their concerns. The objectives agreed were:

- To feel inspired and motivated through reaffirming our People First strategy
- Agree medium-term business planning priorities
- Identify what we need to take into account in our business plan review
- Ensure all GLT voices have been heard.

Jacqueline suggested that a flexible agenda and conversational approach would be more likely to achieve both the business and team effectiveness aims than one which was tightly facilitated and process-driven. It would also enable GLT team to be partners in managing the direction and outcomes of the meeting and give members the opportunity to take lead roles at different times.

We discussed and identified ways of managing the risks inherent in the approach and Jacqueline introduced models to enable the team to:

- Gain consensus without feeling their views had been compromised
- Notice and give objective feedback on the level of support versus the level of challenge that they were experiencing during the meeting, so that this could be openly discussed and managed
- Re-direct the conversation if necessary using a diagram highlighting the different levels of conversation; from vision and mission, through strategy, business planning and operational planning to individual and team plans.

On the day, Jacqueline ran an initial session to enable the GLT members to get to know each other better as individuals and to agree ways of working. Whilst the participants were keen to get on with the business aspects of the agenda, they recognised that the

session gave them a better understanding of the perspectives of others, making challenging conversations more productive.

Jacqueline adopted some of the processes suggested by the participants to better facilitate some of the more detailed business discussions and adjusted the agenda throughout the day in response to participant needs, ideas and the outcomes of discussions.

Feedback from participants indicated that their aims had been largely met, and could now be more fully achieved over the coming months. Jacqueline provided a report consolidating the formal feedback and made a number of recommendations to increase the effectiveness of the GLT.

## Benefits

- The workshop resulted in a set of potential scenarios, an agreed direction of travel, and a number of guiding principles that brought together the different views and approaches within the team. The team also agreed a common set of communication messages and how these would be delivered to different stakeholders
- All of the actions agreed had someone responsible for them and a timeline
- The group recognised, for the first time as a group, that there was a ‘burning platform’, that it was real and that it required the urgent attention of the GLT working as a team
- Jacqueline introduced a number of models and frameworks that will be useful in supporting future team discussions
- Participants reported that Jacqueline’s facilitation:
  - “Helped us to bank agreements and record key issues”
  - “Moved us along, and prompted us to maintain focus”
  - “Made sure everyone was heard”
  - “Set a good tone through a supportive and empathetic facilitation style whilst being firm”
  - “Provided a flexible and structured balance of approach.”

Jim Emerson, then interim CEO commented:

*“Sometimes we cannot see the wood for the trees; getting out of the office and looking beyond the daily tasks and problems in our function or other area of responsibility helped us to raise our sights to see the whole, and to recognise and agree on the bigger, more fundamental challenges we faced. The organisation clearly needed and is benefitting from this meeting and Jacqueline’s facilitation and guidance was of great value.”*