



ANNE PATTILLO

Transforming organisations

This year promises to be just as busy as 2003, with interesting and challenging work already underway. This edition of my occasional newsletter, TRANSform, tells some of the stories of what clients have been achieving over the past twelve months.

My work continues to focus on helping client organisations build their leadership capability and organisational performance – from defining outcomes to strategy and culture shaping.

We have worked together to build a strategic leadership capability based on a clear view of the environment in which they operate, sound judgement about the way forward and with a clear sense of the essence of the purpose of the organisation.

Another important part of the work has been supporting clients to connect with their stakeholders. Improved policy and services can be shaped through robust relationships that build trust and confidence in an organisation.

Thanks to you all for allowing me to be part of your projects last year and for making 2003 such a great year. I look forward to working with you again.

Unleashing the power of the organisation

I've been working for some time with the Community Development Group in the Department of Internal Affairs.

The group promotes the building of strong communities through encouraging local solutions to local problems, building government /voluntary sector partnership and providing excellent services through best use of information technology.

Recently, the group has moved from self-managing teams to establishing a clear and functional management team with responsibility for performance. My role with the team has been to work with them on focusing on their outcomes and their vision and plan for the future.

They wanted a way to be able to connect the work of each of their local offices to the departmental and government outcomes that they had identified. They wanted to engage, refocus and reinvigorate staff for the future and the outcomes they wanted to achieve.

I developed a regional planning process that balanced creating a clear line of sight from the work they do and the outcomes that were to be achieved. I designed the planning process so that local managers could lead it. The design of the plan template and the process meant

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New approach to performance appraisal to enhance relationships

Everyday I work with organisations that want to focus their culture on teamwork and working for the benefit of the whole organisation or the people they serve.

Performance management strategies were initially developed to help get people focussed on the performance of an organisation and to assist an individual's development. The problem is often that performance appraisals are generally focused on the performance of individuals rather than enhancing the team performance.

An innovative approach I have been using changes the dynamic of the appraisal process to using a team-based performance appraisal with individual attention.

Recently I worked with a not for profit organisation that wanted to use a team-based approach to performance appraisals for its core team of five. The manager wanted a written appraisal done in a way that all the team members could reflect on the performance for each team member.

The aim of the process was to give feedback, explore development, and give people the opportunity to reflect on their performance, to have a record of it and to build a stronger team. It was an experience that would engage people in the future as well as recognising their previous performance.

In less than a day, we completed performance appraisals for a team of five. Performance records were completed, development plans were in place, feedback given and received. It was not a process without challenge, nor without risk – but it strengthened the team and gave a clarity for the people in the team about what they needed to do next.

People prepared by thinking about how the year had been for them in terms of their performance and the performance

of others. Each person told the story of their year. It was not a Pollyanna approach as there were challenges within the team in terms of relationships, performance and development.

This team was willing to try something different and wanted the performance appraisal to reflect the team they wanted to be. The other critical element was the spirit of invitation – you could choose not to participate. The whole team chose to be part of the process – even the one member who initially wanted only to observe the process was happy in the end to look at their performance story.

This approach reinvigorated the practice of performance appraisal to be more in tune with the culture, team and leadership practices in an organisation.

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that local plans could be integrated and flowed through into a bottom up approach influencing national operational plans.

Teams got excited about using their regional hui as conference opportunities to develop their plans. Each one was facilitated by one of three regional managers using facilitation guide we had developed. Each manager provided their own personal

touch to the style of leadership – one even stripping (to another set of clothes) as part of the facilitation activity to make their point about changing the business! The result was local and regional plans which were locally owned and aligned to the national direction.

While the planning events were themselves successful, the plans are already delivering benefits. People are thinking differently, teams are looking to change who does what and how to better direct their activities, work with their communities and use the full resources in the team.

This was a dynamic process where the calls were made by the people closest to judge what was needed in the communities in which they worked in. The plans were practical because they were written by the people who were going to make them happen.

Building trust – the heart of public participation

I am very pleased to have been asked to present a paper to the International Association for Public Participation in the United States later this year.

I will be giving the conference a case study of the experience gained in my work with the New Zealand Food Safety Authority as we have worked to build the trust of food consumers.

The Authority has modelled a range of ways to build balanced dialogue with food consumers, people who are passionate and determined to change the way we produce and distribute our food.

The Authority had had a few attempts at communicating working the forum through normal consultation processes, with little success. Despite this the food safety team were still committed and looked for a different option. I was asked to facilitate the forum using Open Space Technology.

We used Open Space techniques to allow the group collectively to set the agenda. This process changed the dynamic in the forum so that everyone – consumer, public servants, academics and national association representatives could work on the questions that mattered most to them and be influential in ensuring the effectiveness of the New Zealand Food Safety Authority.

Over time the forum has developed its own terms of reference with a commitment to a two-way dialogue and the consultation being timed to an integral part of shaping the work the Authority does.

As a result, the consumers' forum has funds they direct for research in areas that are important to its members, it has contributed to the shape of the Authority's strategic direction, to the domestic food

review and to building a forum programme to discuss with more specific concerns such as pesticides and Genetic Modification.

I will be discussing in Madison, Wisconsin, the critical requirements for effective consultation. It is a case study that underscores the opportunity to use active public participation to build trust and confidence in the work of an organisation and to shape the effectiveness of the work of an organisation.

Sergeant Donna rules the office

Many of you will have talked with the admirable Donna Sargent, who runs my office with military precision.

She is the keeper of lists of things to do, places to be, people to see.

Donna is the brains behind the administration of my office. She is my organiser and just quietly she is remarkably suited to her name.

So if you want to check dates, set up a time to talk, plan out the rest of your year, or find out whether your slightly strange request is something I can help with ..Donna is your person. Salutes are optional.

It's Anne with an E

I know that Pattillo is a difficult name to spell – there are many ways to misspell it and the advent of email meant that many of my messages were bouncing.

So I thought I would lick the problem by changing the address to anne@apconsulting.co.nz. Simple. Well not quite. My emails are still bouncing when people forget that I am Anne with an e.

The Society of Kabalarians who have been researching and analysing names for over 70 years provides a clue to why this might be happening. According to the Society, my name, Anne with an e, is for people who are quiet, reserved, serious and studious – people who don't express themselves spontaneously.

The other version of my name is for people who are original, inventive and enjoy being with people in a social environment.

So it is clear that I am being renamed to match my personality. However, obviously my parents did not go in for name analysis and I am stuck with Anne with an e.

I have flirted with changing my name to something like Rose, Grace or even Lola, names that are misspellable but I think that may cause even more problems.

So just see me as the quiet, studious Anne with an e – who can be reached through anne@apconsulting.co.nz.

And if you want to find out about your name check out www.kabalarian.com.

anne with an e

what is the WORLD CAFÉ?

Remember the last time you had a great conversation – the one that made you think, shifted your opinion or got you moving. In a nutshell, that's what World Café generates. It is a way to create conversations to discuss questions that matter to a community or organisation.

It brings people together in the environment of a simulated café where small conversation clusters explore questions where collaborative thinking can make a difference. It is based on the assumption that people have the ability to take on the most difficult challenges.

Each group has a conversation host (like any good party!) and explores key questions or issues, using paper tablecloths as a record point. People can move through several round of conversations from table to table and the groups eventually come together to share their discoveries with each other.

People worldwide are using World Café in settings ranging from big conference centres to small rooms, from meetings of thousands of people to a handful.

It is being used by a consumer products company to integrate their marketing strategies, by governments for scenario planning, by local communities to facilitate technology for the common good and universities have even created virtual on line Knowledge Cafes for distance learning.

Discussing GM in the World Café

When the Environmental Risk Management Authority (ERMA New Zealand) approached me to help manage public discussion during its road show throughout New Zealand after the lifting of the moratorium on Genetic Modification, it was clear that this was a very important discussion that the organisation wanted to have with New Zealanders.

Everyone is a stakeholder for ERMA – from those who want more research into GM to those who are concerned by the risk of further research. The aim of the road show was to give people an opportunity to meet with ERMA staff, Authority members and Nga Kaihautu to discuss the policy change, decision-making and risk management.

ERMA wanted to communicate directly with New Zealanders about this critical issue, and their approaches to managing genetic modification in New Zealand. People needed to have confidence in the ability of ERMA to carry out its responsibilities.

The Authority wanted to change to a dynamic form of communication from the legalistic applications and submission process to dialogue on both sides of the argument.

We used World Café for the public discussion part of the meetings as it has structure in terms of focusing questions yet enables everyone the occasion to ask their own questions and keeps the discussion at an informative level. It has that element of conversation and dialogue about things that matter – and this is something that mattered. For the provision of information to the public, we used “an open house” approach where an information display was supported by people able to answer questions and take those attending through the gallery of information which included videos, direct links to websites as well as displays and pamphlets.

Staff members were encouraged to converse and chat. Protest action was met with invitations to come inside for a cup of tea and a chat.

Not everyone wanted to chat – some wanted to act – but the café conversation continued amid sirens and chants.

During the process people did get to talk about the things that were most important to them. They talked to ERMA staff and Authority members and the meetings raised the level of information in the community. It also helped the Authority to shape their perspective around the things that are most important to New Zealanders, one of which was clearly food.

Authority Chairman Neil Walter said the road show offered an opportunity to build understanding and connect with people. It was a timely reminder of the need for care and humility in the decision-making of the Authority.

Psst ...

Did you hear the one about...

It is always an interesting exercise sitting down to think about the stories about my work that I could use in my newsletter.

I am involved with hugely diverse range of clients and types of work and over the years have had some fascinating experiences and been part of some confidential stuff too.

When it comes to writing the newsletter though, confidentiality of information is key. I talk only about work with the blessing of the client.

I guess I could tell you about the other things I do...but then I would have to kill you!

Thank you to those clients who agreed to the release of their stories for TRANSform.

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facilitation & planning
project management
organisational transformation
open space technology