

CASE STUDY BRIEFING

Presentation Time including group discussion & questions: ___ min

Role:

- Familiarise yourselves with the scenario.
- You are a team of facilitators – working for a Management Consultancy.
- What you have been given has been collected as part of an information-gathering exercise conducted by your company. First you will be given the brief from the Manager. Then after you have done some preparation, you'll be given further details about the team members involved. Information that you may normally only find out during your facilitated session.
- You will be asked to prepare to conduct a facilitated / chaired session with your group.
- You will be asked to present (on flipchart) your preparation and planning to the whole group at the end of the workshop. The whole group represents your wider Consultancy. They will discuss your planning, ask questions and give you some constructive feedback about the way you propose to move forward.

Task 1 - please discuss and capture your thoughts:

The Managers brief:

1. Who do you think should attend this meeting?
2. Should it be chaired or facilitated or both?
3. What leadership style would you recommend?
4. How many facilitators would you send along?
5. How long do you think this would take? Over one meeting or a series of meetings?
6. How would you start and finish the meeting? (please write your proposed agenda, introduction to the meeting & ground rules if you are using them)
7. How would you structure the meeting?

Now you know more about the people attending the meeting:

8. How would you strategically handle the meeting? What tools would you use? What would your Plan B be, if it didn't go to plan?
9. What kind of difficult behaviour could you expect in this type of meeting and how would you handle it?
10. What communication tools and techniques can you use?
11. Do you have any other issues you would like to raise with regards to facilitating this meeting?

SITUATION 1 – CONFLICT IN THE TEAM

Facilitators

You have been asked by the Finance Team Manager to facilitate a short meeting (approx. 20-min) to try and resolve some motivational and morale issues.

You have met with the Team Manager and your impressions of him are that he's a good Manager who wants to help his team move forward after months and years of difficult change and re-structure.

Please read below the issues that the Manager has presented to you and prepare with your co-facilitator how you feel you can go forward with this meeting.

You have 15-min to prepare and then your meeting will begin.

The Manager

You are a keen Manager and have struggled in the past few months to get your team to agree to goals because some team members just believe that every time we set goals and attempt to achieve them – they are suddenly changed.

You have 3 team members:

Person 1 is an outgoing, strong individual who often takes unnecessary control of decisions that should be made by the Manager. They are loud and bossy with other team members but are still willing to embark on change and sometimes can even be quite keen to drive change forward.

Person 2 is a quiet and conservative individual who clearly misses the old way of doing things. They are very 'needy' and seem to want to spend a lot of time getting re-assurance from the Manager. Unfortunately, because of the re-structuring, the Manager doesn't have time for individual meetings.

Person 3 is a structured, process driven individual who has fought against the changes the whole way. They hate all the re-structuring and don't believe that many decisions are beneficial or necessary. They seem to try and block every decision the Manager makes.

You would like a facilitator to help you and your team talk about how they will agree to work together (almost like setting some kind of a team charter) so that they can move forward.

Person 1

Situation 1 – Conflict in the Team

Facilitators Role:

Two facilitators have been asked to conduct a meeting where you and your colleagues will be attending. They will try and help you work out a way of communicating and behaving together to move forward. The meeting will last no more than 20-min.

Your Managers Viewpoint which they have told you prior to this meeting:

Your manager is a keen and nice person who is quite quiet and doesn't really communicate much. You feel that they are always blaming the organisation for all the changes and don't seem to take much responsibility themselves for all the upheaval that these changes cause the team.

There are 3 of you in the team who report to the Manager

Person 1 (YOU) is an outgoing, strong individual who often takes necessary control of decisions that should be made by the Manager. You really support change within the organisation but feel that the way the Manager communicates this is unprofessional. You like decisions to be made more quickly and you would like it very much if your Manager stood up for the team from time to time.

Person 2 is a quiet and conservative individual who clearly misses the old way of doing things. They are very 'needy' and seem to want to spend a lot of time getting re-assurance from the Manager. Unfortunately, because of the re-structuring, the Manager doesn't have time for individual meetings.

Person 3 is a structured, process driven individual who has fought against the changes the whole way. They hate all the re-structuring and don't believe that many decisions are beneficial or necessary. They seem to try and block every decision the Manager makes.

You have 15-min to sit with your other team members to prepare how you will behave during this meeting. Please do not share all the details of how you perceive yourself.

Person 2

Situation 1 – Conflict in the Team

Facilitators Role:

Two facilitators have been asked to conduct a meeting where you and your colleagues will be attending. They will try and help you work out a way of communicating and behaving together to move forward. The meeting will last no more than 20-min.

Your Managers Viewpoint which they have told you prior to this meeting:

Your manager is a keen and nice person who is quite quiet and doesn't really communicate much. You feel that they are always blaming the organisation for all the changes and don't seem to take much responsibility themselves for all the upheaval that these changes cause the team. You like your manager but think that they don't always take enough control of the team.

There are 3 of you in the team who report to the Manager

Person 1 is an outgoing, strong, blunt and rude individual who often takes unnecessary control of decisions that should be made by the Manager. They seem to support change within the organisation. They are very impatient and don't seem to think things through before suddenly going off on tangents. They are not a team player and you don't enjoy working with them.

Person 2 (YOU) is a quiet and conservative individual who clearly misses the old way of doing things. You are not afraid to admit that you don't like all the change that you have been subjected to over the past few months and years. It has really affected your work/life balance and you're not happy about it. You like your manager and want to spend more time with them because you feel they should be doing more 1-1's with the team – but your Manger doesn't ever seem to have time to discuss issues with you. You're feeling quite demotivated.

Person 3 is a structured, process driven individual who has fought against the changes the whole way. They hate all the re-structuring and don't believe that many decisions are beneficial or necessary. They seem to try and block every decision the Manager makes.

You have 15-min to sit with your other team members to prepare how you will behave during this meeting. Please do not share all the details of how you perceive yourself.

Person 3

Situation 1 – Conflict in the Team

Facilitators Role:

Two facilitators have been asked to conduct a meeting where you and your colleagues will be attending. They will try and help you work out a way of communicating and behaving together to move forward. The meeting will last no more than 20-min.

Your Managers Viewpoint which they have told you prior to this meeting:

Your manager is a keen and nice person who is quite quiet and doesn't really communicate much. You feel that they are always blaming the organisation for all the changes and don't seem to take much responsibility themselves for all the upheaval that these changes cause the team. You like your manager but think that they don't always take enough control of the team.

There are 3 of you in the team who report to the Manager

Person 1 is an outgoing, strong, blunt and rude individual who often takes unnecessary control of decisions that should be made by the Manager. They seem to support change within the organisation. They are very impatient and don't seem to think things through before suddenly going off on tangents. They are not a team player and you really don't like working with them.

Person 2 is a quiet and conservative individual who clearly misses the old way of doing things. You feel like the world is on your shoulders all the time and there have been so many upheavals – you just need to be able to talk to your Manger more often. You really like them but they don't ever seem to be available for a chat. You don't feel like the Manager cares for the team like they used to.

Person 3 (YOU) is a structured, process driven individual who has fought against the changes the whole way. You are willing to admit that you hate change and really resent the fact that ACC persist in making change for change sake. They don't evaluate the benefits of change and when you ask questions about how much research they've done – often the answer is unsatisfactory. You spend a lot of time asking questions that you never get answers to. You are very unhappy in the team and don't feel like the other team members like you very much.

You have 15-min to sit with your other team members to prepare how you will behave during this meeting. Please do not share all the details of how you perceive yourself.

SITUATION 2 – SCHOOL CLOSURES

Facilitators

You have been asked by the Head of Head Teachers to facilitate a short meeting (approx. 20-min) to achieve some agreement over which schools should be closed in Aberdeen.

You have 15-min to prepare and then your meeting will begin.

The Head of Head Teachers thoughts

There will be 3 or 4 people attending this meeting. At least 3 will be Head Teachers representing the identified school's in Aberdeen and 1 person may be coming along to support their Head in their capacity of a Deputy Head.

Schools that are under discussion are

- Kingswells High
- Stonybridge High
- Daywood High

One of these schools must face closure in the next few years and it must now be decided which one.

Person 1 – KINGSWELLS HIGH

Situation 2 – Schools Closure

Facilitators Role:

Two facilitators have been asked to conduct a meeting where you and your colleagues will be attending to discuss which of the three schools named will be closed in the next few years. It is acknowledged that a decision must be taken at this meeting. The meeting will last no more than 20-min.

Your Role:

You are a strong-willed individual who feels very strongly that your school must be kept open. You have the following facts available to you and you can disclose as much or as little as you wish – depending on how effective you feel the skills of the facilitator are.

Reasons to keep the school open:

- It's brand new – only built 2 years ago – waste of money etc.
- Accommodates a need that the residents of Kingswells have been begging for, for years – to suddenly give them a school and then take it away seems unreasonable.
- You have recently been promoted to Head and fear that you would lose your job and title.
- You see the school as a challenge and a good project to help the kids of Kingswells whose behaviour really isn't great.
- Other schools are not run as efficiently as yours.
- You have low overheads.
- You try to stay open during the winter months with snow etc.

Reasons to close the school:

- You have very low success with children's results
- Behaviour at the school is terrible
- Not good for overall ratings for Aberdeen schools
- You have seen development plans for Aberdeen and notice that should another community be built next to Kingswells in the near future – they may suddenly be 2 high schools right next door to each other. Perhaps by closing one school and building the next one slightly bigger, it would work?

Person 2 – STONYBRIDGE HIGH

Situation 2 – Schools Closure

Facilitators Role:

Two facilitators have been asked to conduct a meeting where you and your colleagues will be attending to discuss which of the three schools named will be closed in the next few years. It is acknowledged that a decision must be taken at this meeting. The meeting will last no more than 20-min.

Your Role:

You are a quiet but determined individual who feels very strongly that your school must be kept open. You have the following facts available to you and you can disclose as much or as little as you wish – depending on how effective you feel the skills of the facilitator are.

Reasons to keep the school open:

- It's an old school, built in tradition and has a lot of history.
- The residents of Stonybridge would be absolutely devastated if a cornerstone of their community was removed.
- You have recently been promoted to Head and fear that you would lose your job and title.
- You see the school as a challenge and a good project to help the kids of Stonybridge whose behaviour has steadily improved under your leadership over the past few years.
- Other schools are not run as efficiently as yours.
- You have low (ish) overheads.
- You have never yet closed during the winter months with snow etc.

Reasons to close the school:

- Your school is not running at capacity. You have places available.
- You struggle, because of the location to get teachers to stay on long term contracts.
- Not good for overall ratings for Aberdeen schools
- You're aware that the school is old and will start to have big upkeep costs in the future. Perhaps closing this one and building a larger one or using the newer school that is closer to Stonybridge itself may be an option?

Person 3 & 4 – DAYWOOD HIGH

Situation 2 – Schools Closure

Facilitators Role:

Two facilitators have been asked to conduct a meeting where you and your colleagues will be attending to discuss which of the three schools named will be closed in the next few years. It is acknowledged that a decision must be taken at this meeting. The meeting will last no more than 20-min.

Your Role:

You are a strong willed and opinionated individual who feels quite strongly that your school must be kept open. You have the following facts available to you and you can disclose as much or as little as you wish – depending on how effective you feel the skills of the facilitator are.

You have brought your Deputy Head along to support you in this meeting. Your Deputy Head can take on any role they wish.

Reasons to keep the school open:

- It's an old school, built in tradition and has a lot of history.
- The residents of Daywood would be absolutely devastated if a cornerstone of their community was removed.
- You have recently been promoted to Head and fear that you would lose your job and title.
- You see the school as a challenge and a good project to help the kids of Daywood whose behaviour has steadily improved under your leadership over the past few years.
- Other schools are not run as efficiently as yours.
- Your Deputy Head is very worried that they'll lose their jobs and not sure there will be many more jobs available in Aberdeen in the near future.

Reasons to close the school:

- Your school is not running at capacity. You have places available.
- You struggle, because of the location to get teachers to stay on long term contracts.
- Not good for overall ratings for Aberdeen schools.
- You tend to have to shut quite a lot during the winter months for safety reasons and also because teachers can't get in.
- You're aware that the school is old and will start to have big upkeep costs in the future
- You have seen development plans for Daywood and have noticed that there is a plan to build a new high school quite close to Daywood.
- You struggle with anti-social behaviour and your school sits on a main road. Children have been reported after school to be dashing across busy roads and acting anti-socially. It's a matter of time before there is a terrible accident.

SITUATION 3 – TEAMBUILDING

Situation

You and your colleague have been asked to facilitate a meeting – to help them achieve an ultimate goal.

Number of Attendees

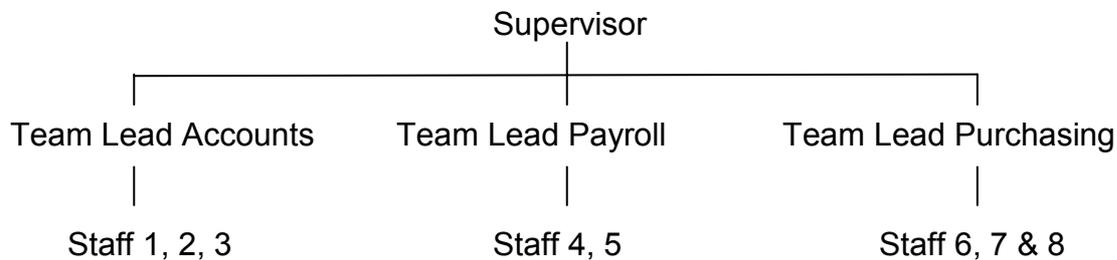
4: (1 Supervisor Finance, 1 Team Lead Accounts, 1 Team Lead Payroll, 1 Team Lead Purchasing)

Objective of the Meeting

To assist the Leadership of the Finance Team to plan a Teambuilding event. You are aware there are issues within the team.

Details

The Supervisor of the Finance Team has identified that the team needs to do some teambuilding because there are issues in the team that need to be addressed. The Team organigram looks like this;



The view of the Supervisor regarding the team issues are

1. Staff within the Accounts team have a “them and us” issue with the staff in the Purchasing and Payroll team.
2. Staff are de-motivated and do not help each other out when they have completed their own work.
3. There is no feeling of unity across the department.
4. Team Lead Accounts, Team Lead Payroll and Team Lead Purchasing do not respect each other’s teams. They don’t encourage unity and help between the smaller aspects of the team.

The Supervisor has a very laid-back attitude and doesn't like the idea of conflict at all within the team. They have an open-door policy and wishes that the staff would use it more.

The Supervisor has asked the facilitator/s to help the leadership team find a 'teambuilding' solution as they have not been able to agree internally. The Supervisor feels that a day out of fun activities is all it will take to get things back on track. The Supervisor is looking forward to this meeting and will support the decision to have a facilitator.

Situation 3 - Teambuilding

Your role: Team Lead Accounts

You have identified that the team has issues but feel it's not the facilitators responsibility to solve these issues. You feel very strongly that it is the role of your Supervisor to correct these issues.

You believe that because the Supervisor is so laid-back in their attitude; they have seldom dealt with difficult staff issues, they have an 'open door policy' and everyone in the team is too scared to go and see the Supervisor because there is a belief in the team that the Supervisor won't do anything anyway.

You also don't believe that the Team Lead Payroll and the Team Lead Purchasing help at all because the Team Lead Payroll is very good friends with the Supervisor and the Team Lead Purchasing is too quiet and introverted to do or say anything.

You don't hesitate to speak your mind and you feel that this meeting will be a great opportunity to express yourself – however you bear in mind that although you don't mind speaking out, you also don't want to cause too much conflict in the team.

Situation 3 - Teambuilding

Your role: Team Lead Payroll

You have identified that the team has issues and you agree with the Supervisor that using a facilitator to plan a team day away is an excellent idea.

You believe that because the Supervisor is so laid-back in their attitude it is potentially an excellent team to work in. You do feel from time to time that the Supervisor is a little too laid-back and sometimes think that difficult issues are not dealt with as quickly as they could be. You also like the fact that the Supervisor has an open-door policy.

You feel that the Team Lead Accounts is very aggressive in their nature and often seems to encourage conflict in the teams. The Team Lead Accounts is a trouble maker and the team would probably be better off if they left the team. The Team Lead Purchasing is too quiet and introverted to do or say anything so no-one ever knows how they really think or feel.

You intend to approach this planning meeting with enthusiasm and will support the decisions that the Supervisor makes.

Situation 3 - Teambuilding

Your role: Team Lead Purchasing

You have been told by the two Team Leads and Supervisor that there are problems in the wider team. They want to plan a team building day out and you don't have too many opinions either way. You were unaware of the problems in the wider team and you and your team tend to keep to yourselves.

You believe that the Supervisor is very laid-back in their attitude. Sometimes it's a great team to work in and sometimes (when there is a lot of conflict) you really don't enjoy working in the wider team. The staff that work for you completely agree with you about how the wider team function.

You do feel from time to time that the Supervisor is a little too laid-back and sometimes think that difficult issues are not dealt with as quickly as they could be.

You feel that the Team Lead Accounts is very aggressive in their nature and often seems to encourage conflict in the teams. The Team Lead Payroll is very friendly with the Supervisor so you notice that that seems to cause more conflict with the Leads.

You're not sure how a team building day will benefit anyone in the team as things seem to be okay the way they are. You've been in the team the longest and you encourage your staff to keep to themselves to avoid getting dragged into conflict issues.

You'll be polite and a little disinterested in the meeting. You won't be overly keen to express your views or thoughts.