



## Teambuilding survey turned our board meetings around

East Derby PCG used an online survey to assess the strengths and weaknesses of its management team. Christine Durance and Veronica Marsden explain its value

Christine Durance, *RHV, RGN, Independent Consultant and Facilitator* and Veronica Marsden, *Chief Executive, East Derby PCG*

This is the developmental journey of East Derby PCG. It describes how the PCG used a diagnostic tool to help build a stronger management team, and to facilitate and monitor change along the way.

The PCG board had been together since April 1999 and had undertaken some team building exercises. First, the board took part in a facilitated team building weekend, which allowed board members to get to know each other as individuals and recognise the skills of each in decision making. The second event attended by the PCG involved benchmarking. Although the management team came from a variety of backgrounds, it had little knowledge of primary care, apart from the chief executive.

It was important for the team to take stock of earlier team building exercises, judge how successful the exercises had been and assess where there were gaps in order that the team could continue with its ongoing organisational development. East Derby PCG decided to use a tool called teamindex360© — a methodology for understanding where teams and organisations need to focus their energy and activity in order to make the most of change. At its core is a questionnaire that enables managers to gain a balanced view of an organisation's processes, management and culture. To do this it must focus on aspects that are difficult to measure, such as values, teamwork and commitment. The results are grouped in to four sections:

- the resources available
- how these resources are organised and used
- how people work together
- whether everyone in the organisation is heading in the same direction.

Administering the tool is quick and easy, and can be done either by questionnaire or on-line via a website. Completing the 72 questions takes about 10 minutes, which helps to ensure a high response rate.

The tool can also be applied to personnel working at all levels from a new recruit to chief executive — a major bonus, which ensures ownership and commitment right from the start — and can be used with any size of team.

The process is totally anonymous and therefore people can answer very honestly. The questions are simple and non-technical, and phrased in short sentences. This is not only for the benefit of those filling in the questionnaire, but also because simple language gets the message across quicker to the recipient of any feedback from the questionnaire.

The results are easy to interpret and are visual — there are no complicated statistics. Results are presented either side of an average (which can be chosen to represent a variety of different benchmarks). This means that people naturally look at their low scores and tend to feel that they would like to improve them.

teamindex360© is particularly effective when used following a period of change to assess how people have adapted and to highlight areas where there is still work to do. It is extremely flexible and can be used in a number of different ways depending on the needs of the organisation. For example, the index can be used to:

- review the organisation as a whole
- compare different teams, divisions, functions and locations
- contrast the views of team members, such as managers versus the rest of team
- measure performance over a period of time
- benchmark against your own organisation or the index's external database.

The planned feedback session from administering the index was overtaken by events outside board members' control namely an impending merger between East Derby PCG and its neighbour, West Derby, in the New Year. When the PCG met for the feedback session the merger had only just been mooted and members had not had time to discuss or come to terms with the implications. Four members of the group did not return their questionnaire. The results showed some clear differences in views between the board and management team, and were presented to the PCG as a chart. In small groups participants were asked to review the responses while identifying and discussing two issues they felt required further discussion by the PCG. Some clear priorities emerged, including the need to:

- increase the amount of time available for review and plan for improvement;
- review workloads and identify areas for improvement that are purely down to resources;
- use a facilitator in future meetings to help the review process and monitor progress;
- include training and development;
- review standards for addressing under-performance and rewards for good performance;
- consider how conflicts in the PCG can be overcome while remaining focused on work.

The process enabled the PCG to focus on its performance as a team. The information provided by the survey on the different views of team members enabled them to question the extent to which they contributed to areas of effective and ineffective performance. As the information related to everyday issues, this focused the team on performance rather than personality — which helped facilitate team building.

As East Derby is the first PCG to have undertaken the exercise there are no comparative data on other PCG teams. But given the part-time nature of PCG work for most board members, it seems likely that dilemmas about juggling duties are universal. The activity seems to have helped the PCG to approach its tasks by focusing on the 'people' side of the organisation, which should help them work more effectively. Any team working in the NHS is likely to find the survey useful. It is a tool that can facilitate and guide managers and practitioners in facing the many and varied challenges expected of them in a rapidly changing health service. Since the work was first completed, the two PCGs have merged and are working on an application for PCT status in 2001. The process may thus need to be repeated at a later stage once the application has succeeded.

### **Teambuilding exercise turns management around**

Using the teamindex360© survey provided East Derby PCG with:

- A jargon-free way of measuring team performance
- Results based on team performance, not personality differences
- A mechanism for facilitating team development
- Baselines to monitor team development
- Training and development priorities for the team
- Data on within-team and between-team perceptions
- Descriptive, as opposed to proscriptive, analysis

East Derby PCG's board has seven GP members, two nurses, one lay, one social services member, a non-executive member and the chief executive. The management team comprise a development manager, public health strategy manager, financial accountant and administrative assistant.

**Comment: Veronica Marsden  
Chief Executive, East Derby PCG**

Bringing a group of almost strangers together and asking them to function collectively, corporately, and comfortably to achieve the aims of a PCG is a tall order.

East Derby PCG had a great start — there was a uniform desire to make the PCG work, and members were open to suggestions on how to develop the close working relationships that we needed to achieve this. The board members had to get to know one another, understand each other's roles, knowledge base, perspectives, and culture and appreciate the contribution of each as an individual to the discussions and decisions of the board. Above all the board wanted to function well and enjoy the experience.

First, we focused on the chairman, who had a new role to fulfil. As a GP with experience, enthusiasm, political awareness and a deep-seated fear of managing board meetings he welcomed the training offered by our HA. Following this the PCG had one of their board meetings audited. An independent HA observer sat throughout and monitored the board members' interactions. This was extremely illuminating when the hard-hitting feedback allowed us to understand how to allow and acknowledge contributions from all members resolve potential conflict and deal with the matter in hand. As a result, board meetings have been well attended, business has been carried out in a professional and timely manner and trust between members has grown.

We have held two workshop weekends. The first was in preparation for PCG status and to discuss what level the PCG wanted to function at. The second workshop focused on understanding the importance of good communication and the pitfalls when communications systems are less than good. Experienced facilitators from the training consortium in Derby put us through our paces as we went through an illuminating exercise. We failed, but learned much in the process.

Both workshops were felt to be a good use of time, and the social element made them enjoyable. By this time the board decided that meeting once a month was insufficient. We decided to meet twice a month — one for the formal board meeting and once for a development session. Topics for this have included developing incentives, commissioning, discussions about services and primary care development.

This brings us to the teamindex360© project. This was seen as a useful tool as a stock take to see how we were doing. The management team and the board members filled in questionnaires and a facilitator from Leeds University carried out the analysis and feedback. Our strengths and weaknesses were outlined as a result. We used this to pat ourselves on the back and plan for reducing our deficiencies. As such it was seen as an objective tool to help our working mechanisms improve.

Time has moved on, the PCG is pursuing PCT status next year in conjunction with Derby West PCG. The management teams have come together and the Boards have a shared PCT Project Board. New teams, new members, new issues ... teambuilding must continue. The development plan has to match the pace of change and continues to be seen as a vital element to ensure our organisation's success.