

Case Study: University of Essex Students' Union



The Agile Leadership Coaching Toolkit helps Essex Students' Union align to strategy

Background

University of Essex Students' Union (Essex SU) is a charity supporting around 15,000 students each year. Their vision is 'to become the world's most student-centred organisation'.

Assentire (an Agile Business Consortium Small Business Member) connected with the senior team of Essex SU in the spring of 2018 at the Charity Finance Group (CFG) Conference. Rod Willis of Assentire was giving a talk on Agile High Performing Teams, which caught the attention of the Director of Finance and HR. Rod supports the Agile Business Consortium on several work streams, most recently the Agile Culture and Leadership work stream, and he was looking to 'test' the Agile Leadership Coaching Toolkit (ALCT) he had developed for the Consortium. The timing couldn't have been better.

The goal

Essex SU were looking to develop and deploy Agile strategic planning. An initial video call was all that was needed for them to establish their overall goals and confirm they wanted to engage with the ALCT. The following tells the story of what unfolded over a few weeks and two face-to-face meetings.

The current reality

- The charity was four years into a five year strategic plan
- The strong progress of the previous four years was showing signs of slowing down
- The senior team felt if it continued on the same path the current strategic objectives were likely to be missed and, more importantly, may no longer be aligned with the actual needs of the organisation (i.e. strategic drift was potentially already in play)
- The team had some awareness of Agile practices outside the product development domain, and knew it could potentially benefit from external support. This support would need to be found from within the domain of Agile practice

Options explored using the Agile Leadership Coaching Toolkit

- Essex SU's existing strategy was reviewed to establish if there were any items that stood out as missing or no longer required in their current form
- The senior team explored how they perceived the current culture of the organisation through the lens of the Agile Business Consortium's seven elements of Agile Culture DNA. Due to time constraints the team focussed on an A1 poster that detailed all seven Agile Cultural DNA elements and the five levels within each. This allowed each person to express their individual views, while also being able to step back and see the greater picture of the team as a whole
- The senior team independently read the Agile Leadership Coaching Toolkit in-between the first and second meeting and reflected on which items had attracted their attention on an individual basis. Three key items were highlighted:
 - o The Nine Principles of Agile Leadership (CMO)
 - o Psychological Levels (CFO)
 - o Psychological Safety (CEO)
- This team prided itself on being open and accessible. It consciously held people accountable and provided support as and when it was asked for. The prior three items, however, had stimulated a new level of awareness in the team. This prompted them to double-check, asking explicitly how things were going across the organisation. They discovered there had been some drift, creating a gap between their understanding and that of the wider organisation. It transpired some people did not feel 'psychologically safe' after all. For any organisation that requires complex interpersonal relationship management, psychological safety is essential if they wish to be anything more than mediocre. If your vision is 'to become the world's most student-centred organisation', mediocre is just not something the team will ever accept



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- As a result of these reflections and the original exploration of the Consortium’s elements of Agile Culture DNA, the team decided to explore one specific DNA item in more detail - ‘Trust & Transparency’ - using one of the many templates within the toolkit

The way forward for the senior team

- The team members completed the ‘Trust & Transparency’ template independently, and then explored their unique perspectives collectively. This level of independent insight, integrated at a team level through peer dialogue, is one of the most powerful ways to bring about team cohesion along with new insights and renewed vigour to bring about the changes identified by their reflections (both individual and collective)
- The senior team, as a result of using the toolkit, now perceives strategy in a more emergent way in terms of how the team intends to interact with new students and their ideas (for new students are never short of new ideas). They will adapt key aspects of Scrum, considering the new ideas as potential Product Backlog. Once students have agreed to support the initiatives they have suggested, and as long as these ideas align to the SU’s vision and mission, they will become part of the Product Backlog. One of the members of the senior team will take the role of Product Owner, communicating with the many potential stakeholders and retaining a focus on the charity’s objectives
- The team will use and support the use of Agile sprints as a way of enabling rapid development and testing of new initiatives, while staying aligned to the dynamic strategic imperatives of the charity, and including the many stakeholders they represent. By doing so, they will not be confronted with strategic drift!

Conclusion

The intervention was to explore Agile strategy using the ALCT. One of the desired outcomes was for the senior team to be able to continue to engage with the toolkit in a self-help manner. This was achieved by bringing real organisational issues into the mix, while using the ALCT to provide a safe overarching framework that could hold the complexity as it revealed itself. Most importantly, it also provided the means to assimilate new insights and develop the follow-on actions needed to bring needed change to the organisation in a systematic manner that could be communicated both across, up and down the organisation as a whole.

It is planned that further sharing of this new way of working will occur across the organisation, some with the dynamic board, which takes in new members every year. The senior team will also start to use the structure of the ALCT to guide their own interventions as they cascade how they want to work moving forward with their own direct and indirect reports.

The organisation is now considering using the Agile Business Consortium’s Pulse Survey to capture the whole organisation’s view.

For more information on the Agile Leadership Coaching Toolkit, please visit agilebusiness.org/toolkit

