
Venue: UBS Offices 5 Broadgate Place, London, EC2M 2AN

Facilitators: Peter Hanley and Karen Hanley (apologies from Colin Perriss).

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Acknowledgements

The facilitators (Peter, Colin & Karen) would like to thank many people for the opportunity to facilitate the Decision Making workshop. In no particular order:

Denise Fellows – Chief Executive Honorary Treasurers Forum: for having the faith and inquiring mind to suggest that this event be put on. We hope it brings more inquiries about the good work of HTF.

Bruce Gordon (Chairman UBS) & David Rowe (Managing Director UBS) for hosting HTF and the interest and engagement you showed for this workshop topic and the way it was delivered.

To all 54 delegates who came, your enthusiasm and energy and discussion made it all possible.

To all the delegates who came expecting a standard finance sector CIPD lecture and found themselves in a facilitated session; thank you for your appreciation and enthusiasm for the unexpected!

To all the UBS staff who looked after us from door to door, with refreshments and audio-visual; thank you for your calm professionalism that helped make the event flow gracefully.

Event Calling Notice

Forum Meeting: 25 September 2018 – “The conflicts of decision making - and how to find the solutions hidden in plain sight.”

Trustees and treasurers make decisions. They make choices based on a variety of parameters, available data, past experience, human interaction and fear of failure, whatever that means! This session will allow treasurers to explore how they can obtain the clarity needed to make a truly informed choice, a decision based on an understanding of the exact position that choices are being made from and a clear vision of what outcome is desired.

Peter Hanley and Colin Perris will facilitate the discussion based on practical financial scenarios. They will demonstrate how decision makers can use simple yet highly effective methods to achieve a clear understanding of where they are, why they are there and how to get to where they really want to be.

Peter is Hon Treasurer of the General Assembly of Unitarians and Free Christian Churches (GAUFFC). His background includes time in operations underwater in submarines for the Royal Navy, taking decisions that affected lives, money and machines. Peter enjoys exploring the vitality of life on our planet Earth to discover what else it is we need to learn for more successful and harmonious existence. Peter embarked on a campaign to make financial accounting more fun and accessible to encourage better projects and charity performance. Peter will be supported by his colleague Colin Perris, trustee of ‘West Norfolk Riding for the Disabled Association - The Magpie Centre’ (WNRDA).
Facilitators Biographies

Peter Hanley: Peter runs his own company (Real Safety Today Limited) with the primary purpose of helping people and businesses “find out what works”. In addition, he is Honorary Treasurer to the General Assembly of the Unitarian Church. A broad ranging career in engineering high risk and high value assets has taught Peter that regulation is more likely to be the cause of organisational and project failure, than the remedy. Peter has developed an innovative approach to safety where, rather than complying with a set of regulations that need interpreting, it is possible to follow the financial trail and identify where the money is ‘leaking out’ into low productivity and low safety situations. This strategy makes it possible to get two benefits [productivity improvement and assured safety] for one intervention cost. Peter identifies the relationship between finance, projects and safety, meaning that any organisation can develop a strategy focused on seeing all three at the same time, as positive achievable outcomes. This breakthrough strategy is enabled by a new way of connecting money and engineering that integrates organisational purpose, intent and resources.

Peter@RealSafetyToday.co.uk  m: 07984002230.

Colin Perriss: Colin has been an interim executive for more than twenty years with a track record of delivering transformational business results in a variety of sectors. Utilises a unique blend of highly impactful, strategic leadership and exceptional coaching skills to deliver results, as a business and departmental leader, through people. Able to identify and capitalise on unique selling points to quickly create growth and sales performance. Expertise gained in both Sales and Operational Leadership, delivering business results through commercial development and strong account management. Able to build market share through portfolio management, client acquisition and executing strategic marketing campaigns. Key skills include results delivery, negotiation, target delivery, team building, performance management,
recruitment, sales training and coaching. Colin is currently bridging a 110 year span of advances in decision making, by learning to drive a 1908 Renault. Colin is also an active trustee for the West Norfolk RDA Magpie Centre riding for the disabled charity and is currently learning horse archery.  colin@enp4.co.uk  m: 07771299532

Karen Hanley:  Karen is an experienced facilitator with a background in financial services, academic research into money, personal financial planning, mid-life and pre-retirement education. Karen is a Trustee of Quakers and Business, and previously a Trustee of church charities.  KarenHanley@gn.apc.org  m: 07970816190.
Pre-amble to Workshop notes

The heart of this workshop was to introduce delegates to a new way of looking at decision making which involves everyone in the process. This is the “Trustee Process and Strategy (TP&S) Map. In addition we committed to finding simple tools, thus enabling delegates to add to their ‘toolkits’ to support their Trustee work.

Decisions and decision making often focus on what the decision was, and which way it went; yes or no; left, centre or right. Often decisions pit people against each other when uncertainty or emotions run high. This workshop sought to bring the calm and deliberate act of ‘map reading’ to decision making. Map reading is a visual experience that allows many people to share their views at one time. The TP&S ‘map’ has been especially designed for Trustees to navigate decision making as if it were a geographic landscape. Like any good map, the best results are obtained by knowing how it works. The basic features of this TP&S map were introduced as delegates worked with it. The basics are described here to enable readers to gain the most from this report, especially if they were unable to participate at the event.

Trustees can occupy the navigable space of the inner circles of red, yellow and green. In the green, the whole trustee operation will feel calm & effortless, requiring very little input yet delivering a fantastic amount of output. In the green, decisions are easily reached and implemented. In the green, no energy is wasted, there is healthy tension but no unresolvable destructive conflict. In the red, it is the opposite of green. The Trustee body is moving very fast, racing around lots of ‘things to do and targets to be met’, putting in considerable amounts of energy and effort for very little, if any, reward. In the red, most of the energy is wasted, the trustee body spends most of its time in conflict and achieves little tangible outcome. Decisions are difficult to reach and
differences are difficult, if not impossible, to resolve. Subsequently decisions are often undone, thus needing to be revisited with more energy, effort, time and money. In the yellow, the life of the trustee body is not as fast as if in the red, yet still there is less useful output compared to the trustee body input. If the trustee body has been in the red ring and is now in the yellow ring, life will feel as if things have improved. Even with this, in the long term the trustee body’s fortunes will not change much for the better. If the trustee body has been in the green centre and is now in the yellow ring, then life will feel as if things have become worse.

Unlike a conventional 2D map, a TP&S map is not a simple route between points A and B. Whilst it would be useful to understand that you were in the red ring and could set course for the middle, this is not how this map operates for trustees. The major determinant of where the trustee body will be on the TP&S map, are the minds of the individuals and the collective mind created between them; a form of ‘directing mind’. Most of us tend to focus on two modes: 1. What Doesn’t Work (WDW) and 2. What Works (WW). Focusing on What Works takes people into the green centre if all the trustee body are so (collectively) minded. Focusing on What Doesn’t Work takes people into the red or yellow rings; and it only takes one or two so minded to keep the whole trustee body in the red or yellow rings, however much some trustees are wishing for the green centre.

To make decisions, inputs are needed: e.g. knowledge and experience. The purple circles represent many influential inputs (influences). These can range from national regulations to the contributions made in this workshop to the TP&S maps, plus organisational customs and practice. If attention turns to simply how to comply, e.g. with regulation, then the mind will draw the human decisions into the red and yellow rings.
Aide Memoire

Delegates were given a copy of some key guidance material for use during the workshop, which can also be used during trustee board meetings.

The Topic

Trustees and treasurers make decisions. They make choices based on a variety of parameters, available data, past experience, human interaction and fear of failure, whatever that means! This session will allow treasurers to explore how they can obtain the clarity needed to make a truly informed choice, a decision based on an understanding of the exact position that choices are being made from and a clear vision of what outcome is desired.

The Role of Treasurer

To advise the Trustee Board on financial status and options, e.g. ... advising on:

- the financial viability of the charity
- financial implications of the charity’s strategic plan

and as part of a team: ensuring that charity is solvent (sustainable), well-run, and delivering the intended charitable benefits.

Note: In a charity this is an Advisory Role, not a directive role as it would be in a Private Company.
**Headings from the Flip Charts: Internal and External Influences**

Delegates were asked to reflect on the influences (as represented by the purple circles surrounding the central green, yellow & red circles on the map) on their decision making. These were captured at group discussions and written onto a blank Trustee Strategy & Process Map. The table below is a summary of all the influences that delegates identified.

<table>
<thead>
<tr>
<th>Influences (grouped by theme)</th>
<th>1. External</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Charity commission-regulation, regulation/changing regulation (three groups contributed to this)</td>
</tr>
<tr>
<td></td>
<td>Government policy-local/regional/central</td>
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<tr>
<td></td>
<td>Income/funding. External funding (four groups contributed to this)</td>
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<td></td>
<td>Relationship with partners</td>
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<tr>
<td>2. Internal</td>
<td>Remain within Charitable Purposes. Are your charity aims still relevant? (From two groups)</td>
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<tr>
<td></td>
<td>Policies and procedures (lack of...)</td>
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<tr>
<td></td>
<td>Clarity of objectives, including measurement .Impact, measurement. Repeat business. Quality of review of projects, initially and ongoing (four groups contributed to this)</td>
</tr>
<tr>
<td></td>
<td>Chair, Treasurer and CEO must all be “on the same page.”</td>
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<tr>
<td>Stakeholders</td>
<td>International aspirations</td>
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<tr>
<td></td>
<td>Political influence</td>
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<tr>
<td></td>
<td>Managing expectations. Future. Status quo (from three groups)</td>
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<tr>
<td></td>
<td>Relationship with board &amp; management. Communicating with staff</td>
</tr>
<tr>
<td>Management and admin</td>
<td>Experience (of) staff. Executive skills and leadership</td>
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<tr>
<td></td>
<td>Staff planning in uncertain times</td>
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<tr>
<td></td>
<td>Managing staff, temporary staff in uncertain times</td>
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<tr>
<td></td>
<td>Communicating with volunteers</td>
</tr>
<tr>
<td>Risk management</td>
<td>Risk-budgeting, fundraising, pricing, safeguarding, reputation, GDPR, disaster recovery, going concern? Investment management (all groups contributed to this)</td>
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<tr>
<td><strong>Trustees</strong></td>
<td></td>
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<tr>
<td>Ensuring share of voice of Trustees</td>
<td></td>
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<tr>
<td>Experience (of) Trustees. Trustees' skills. Training, memory (equivalent to organisational). (Four groups contributed to this)</td>
<td></td>
</tr>
<tr>
<td>Succession planning and trustee retention (four groups contributed to this)</td>
<td></td>
</tr>
<tr>
<td>Differences in strategy + succession + generation gap</td>
<td></td>
</tr>
<tr>
<td>The past/resistance to change</td>
<td></td>
</tr>
<tr>
<td>Commitment of Trustees</td>
<td></td>
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<tr>
<td>Collective responsibility</td>
<td></td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
</tr>
<tr>
<td>(Everything above) Affected by previous issues (one group contributed this).</td>
<td></td>
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</tbody>
</table>
**Trustee Engagement Experience – Likert Scale**

A Likert scale is a quick and visual way to gauge the distribution of opinion of a group of people, along a spectrum. For this workshop it was felt that “Conflict Level” in Trustee meetings is an important influence on decision making, and something that delegates could easily cast their view on.

The Likert scale used for the workshop consisted of two end point descriptions.

<table>
<thead>
<tr>
<th>Trustee Meeting</th>
<th>Trustee Meeting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conflict Level</td>
<td>Conflict Level</td>
</tr>
<tr>
<td>Lots of</td>
<td>Passive,</td>
</tr>
<tr>
<td>Dissent and</td>
<td>Quiet,</td>
</tr>
<tr>
<td>Disagreement</td>
<td>Nobody Challenging</td>
</tr>
</tbody>
</table>

These two labels were put up on flip chart stands at either end of the room and delegates invited to place themselves along the floor at a point which they felt most represented the general conflict level in their meetings.

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1 This link has a useful background including academic references to Likert Scales; asking for a Print Friendly version will eliminate the advertising that interleaves with the article. [https://simplypsychology.org/likert-scale.html](https://simplypsychology.org/likert-scale.html)
A bird’s eye view of the distribution of people looks like this [note this is representative and not to scale]:

In classical Bar Chart terms this distribution of opinions would look something like this.

This shows that the delegate group as a whole tended more towards passive trustee body engagement, although most were just right of the centre point (above). The delegate group enjoyed this exercise, finding as they looked around to either side, that many had similar experiences of working with their trustee group.
Issues from Intermediate Plenary - selecting one issue to share with the whole group

Trustees Skills & Recruitment

Reserves Policy

Funding

Status Quo - ‘collective way of doing things’

Succession Planning

Organisational Memory

Style: Business Versus Non-Profit

Commitment of Trustees

Impact on Beneficiaries

Key person dependency
What would you do differently as Trustee – single influence

Having seen the Springy (see photo below) demonstration, and how to deliver more useful outcomes, instead of working hard for less output, delegates were asked to reflect on how they would engage differently with a single influence they had identified, with a view to gaining better outcomes.

See what the delegates came up with in their groups; Appendix 4: Photographs & Drawings of Trustee Approaches to Issues and Top Tips. Pages 31-36.

Peter demonstrated, with his engineering model nicknamed ‘Springy’ (left), how (counter-intuitively) less energy into inputs in meetings, can produce greater outputs; versus too much input energy producing much less output.

Many delegates quickly caught on to this concept, via the demonstration.

Peter’s demonstration of Springy available on You Tube
https://www.youtube.com/watch?v=tBbFyUGdQaY&t=5s
What would you do differently? (as a Trustee) – Board level multiple influences

Delegates were then asked to reflect on how they would engage differently with the multiple influences they had identified, with a view to gaining better outcomes.

Here is what delegates came up with in their groups.

**Top Tips – Summary from Final Plenary** (Responses to “What would you do differently?”)

1. **Trustee engagement** - make it fun
2. **Reserves policy** – communication
   - pre-meeting preparation
   - succinct resume
3. **Trustee training** - Treasurer-
   - all trustees know responsibilities
   - away day-where coming from?
4. **Succession planning** - time sequence of skills/competencies
5. **Status quo** - (to overcome) institutionalised. Feedback process at outset.
6. **Regulation** - changed-keeping up-to-date, financial services...
7. **Trusted** - objective viewpoint from new trustee
8. **Risks** - income/reputation
9. **Good** - Chair & Chief Executive
Working Agreements

Suggestions from participants for working well together (Captured on Flipchart)

- Days out (again)
- Ground Rules i.e. “the principles on which future behaviour is based.” Also known as a working agreement [https://dictionary.cambridge.org/dictionary/english/ground-rules](https://dictionary.cambridge.org/dictionary/english/ground-rules)

Working agreement – example (provided by facilitators)

- How can we make business meetings ‘thoughtful’? (e.g. through a mood of mutual respect and deep listening – speaking only when you have something worthwhile and pertinent to say)
- In an atmosphere of trust, assume that people are of good intent
- The chair ensures that those who speak less are encouraged to speak – welcomes tentative opinions and those seeking clarification (perhaps because they are newer -and that there is a common understanding of what has been agreed by how the discussion is paraphrased and summarised
- With the exception of points of clarification, having spoken on a particular topic Council/Board members wait for all other members of Council/Board to speak if they have not already done so before commenting again
- More relevant information prior to meetings will assist newcomers in particular
- Judicious agenda setting is critical
- Scope for use of sub-groups (task and finish groups) needs to be explored
- More clarity is desirable on how best to communicate between meetings (avoiding email overload)
- That care is taken over arrangement of meeting dates
- More thought as to how Council/Board decisions are communicated to the wider constituency
Journey to the Centre

The workshop was a brief introduction into a method of decision making that uses processes and deliberations which are familiar to people, about: a) how hard trustees are having to work, and b) gathering data to assess where the trustee board is on a map.

The two tools, the ‘Trustee Process & Strategy map’ and ‘Springy’, enable trustees to better know where they are and then consider where they would prefer to be. The devices also indicate, to the board members, HOW trustees could approach the navigation process of going from where they are to where they would prefer to be.

The start of the workshop was delegates sharing their experiences of working hard for little outcome, and going round in circles covering the same issues. ‘Springy’ was able to demonstrate what getting very little out despite putting a lot in (being busy busy) looks like. The TP&S map shows that a trustee body may be in the red and/or yellow rings, because each of the influences needs attention, and the Board may be trying to achieve much, but gain little.

Being in the Red or Yellow rings is not a judgement on any individual or Trustee body. It is simply a reflection of what can happen when knowledge is missing about the charity’s environment, internal or external. A major influence on many will be the received wisdom that we have to work faster and more vigorously if we are to reap the rewards we seek (e.g. Protestant Work Ethic). Because working faster can work in the short term, and we rarely have the opportunity to look at rewards over a longer timescale e.g. 50 years, we can be forgiven for believing that working faster is the solution.

To reach the Green Centre we need to achieve two different actions at the same time; rather like “rubbing your tummy while tapping your head”. The first action is to achieve a ‘Goldilocks hypothesis’ work speed, not too fast and not too slow. The second action is to ‘tap’ gently, rather than drive the input in. In the green centre everything is much simpler and the gains more than could have been imagined. Once trustees have tried the TP&S map (coupled with the ‘Springy’s video, https://www.youtube.com/watch?v=tBbFyUGdQaY&t=5s [as a reminder of the action to mimic]), it becomes easier to reach the green centre. With practice becomes easier to reach the green centre, in whatever activities require this process.
Summary of Workshop & ‘Top Tips’ (to take away for the future)

The workshop produced several individual, small group (table) and whole room (plenary) contributions. To enable everyone to see what emerged, these have been collated in this section. It shows that there are many insights as to issues facing Trustees, as well as alternative approaches to achieving better outcomes. It is interesting to note that participants achieved ways forward, in one hour, with a couple of tools and professional facilitation.

Top Tips (from one Table)

1. Educate - share issue.
   - Common understanding.
2. Identify solutions.
3. Accept risks.
4. Decide
   “May need an external view, i.e., someone outside the “red circle” who has no stake in the outcome”
Succession (planning)

Tips to improve success planning

1. Start planning now!
2. Skills audit - internal, external
3. Engage with current role holders - do they want to go?
   - What would they wish they had in skills?
   - What motivated them?
4. Role profile.
5. Contacts/knowledge could be passed on.
6. Flexible timeline.
7. Give potential replacements a taster

- Away day.
- Treasurers can’t abdicate.
- Trustee training in how to engage in governance

Overcoming Status Quo

- Deconstruct the issue to remove the obstacle
- Bringing in external advice to overcome
  - state idea.
  - appeal to “best in class”
  - “best practice”
- De-Personalise
- Immediate feedback/part of process. Institutionalising it
  - capturing new input - debrief on it
- Trustee only sessions (if executive [is] the obstacle)
- involve other members of the SMT (Senior Management Team)? (Without undermining the CEO)

Changing Regulation

| 1. Lack of awareness                  | Networking           |
|                                     | Using professionals   |
| 2. Need to disseminate              | Attending seminars    |
| 3. Ensure Change happens            | Need for a roadmap    |
The Future

People have so many decisions to make, most, if not all, related to money in some way. Life is complicated; in the last 100 years the advances in technology alone have rendered the world we inhabit today totally unrecognisable from then. Much of what was accepted wisdom 100 years ago has been replaced with new wisdoms. What influences our decisions has also changed a great deal.

Financial resources are more difficult to manage successfully. Working this hard for less and less gain is not sustainable, Springy is showing us that working really hard all the time is not sustainable. Organisations and people collapse if they are given no other choice but to work really hard, however little they receive in return, either in income, other rewards, recognition.

Springy shows us we do not have to run all the time, our choice is to try something different when faced with the hectic.

The concept of Springy and the TP&S map are showing between them, that when multiple threads of information are integrated in to one decision making process, then the better decision is possible. Aim to end up in the green Centre, where only a tiny input is required, for good outputs. For now, to assist our trustee boards, we simply need to practice the Trustee Process & Strategy Map, and something of what Springy is showing us. As with all new ways of doing things, training and practice are important for developing and sustaining new skills. We hope you have enjoyed the workshop and will come back to us with your experience of approaching decision making in this new way.
Appendices
Appendix 1: Photographs of Trustee Process & Strategy Maps (7 in number)

These are provided both as a reminder for those who worked on them, and to show the different ways that other tables were using the maps.

Figure 1
Figure 2

Trustee Process & Strategy Map

© Perris & Hanley 2018
Figure 3
Figure 4

Trustee Process & Strategy Map

- Reluctance of trustees
- Lack of engagement
- Key person dependency

- High trustee turnover
- Are your charity's aims still relevant?

- Succession
- Differences in strategy
- Generation gap

- Continuity
- Ethical memory

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Figure 5
Figure 6
Appendix 3: Facilitator’s Written Flip Chart of Plenary ‘Top Tips’

Figure 9
Appendix 4: Photographs & Drawings of Trustee Approaches to Issues and Top Tips

Figure 10a

Figure 10b
- Away day.
- Treasurers can’t abdicate.
- Trustee training in how to engage in governance
Succession (planning) Tips to improve success in planning as an issue.

1. Start planning now!
2. Skills audit - internal, external
3. Engage with current role holders
   - do they want to go?
   - What would they wish they had in skills?
   - What motivated them?
4. Role profile.
5. Contacts/knowledge could be passed on.
6. Flexible timeline.
7. Give potential replacements a taster
Top Tips (from one Table)

1. Educate
   - share issue.
   - Common understanding.

2. Identify solutions.

3. Accept risks.

4. Decide
   “May need an external view, i.e., someone outside the “red circle” who has no stake in the outcome”
### Changing Regulation

<table>
<thead>
<tr>
<th>One Issue</th>
<th>Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of awareness</td>
<td>Networking</td>
</tr>
<tr>
<td>Need to disseminate</td>
<td>using professionals</td>
</tr>
<tr>
<td></td>
<td>attending seminars</td>
</tr>
<tr>
<td>Ensure change happens</td>
<td>Need for a roadmap</td>
</tr>
</tbody>
</table>
Overcoming Status Quo – *one issue selected*

- Deconstruct the issue to remove the obstacle.
- Bringing in external advice to overcome
  - state idea.
  - appeal to “best in class”
  - “best practice”
- De-Personalise
- Immediate feedback/part of process. Institutionalising it
  - capturing new input - debrief on it
- Trustee only sessions (if executive [is] the obstacle)
- involve other members of the SMT (Senior Management Team)? (Without undermining the CEO)