



Operational Framework - Goals, Values & Expectations

Questionnaire

1 Use of This Document

This document presents an overview of a questionnaire for information relating to the goals, values and expectations of a Board / Team / Group / Entity as part of the Operational Framework for Board – Executive Relationships. For persons within these entities, details on the goals, values and expectations are identified using this document. Aimed at those participating, conducting, reporting on or auditing an assessment, this document outlines what the process is, why it is required and what happens to the information collected. This document presents a questionnaire for guiding and recording the discussion for formulation of a report back to the participants.

Please collect business cards where possible. Conduct the interview in a relaxed and informal way, using open ended questions, in a conversation and let the participant talk. Empathise and share experiences as required.

N.B. All Results are Confidential.

2 About the Goals, Values & Expectations Process

Answers to common questions about the Operational Framework – Goals, Values & Expectations process are presented.

What is the Operational Framework?

The Operational Framework is a set of tools and techniques, (an Operational Framework) for use between Boards and Executive Leadership, or other groups, particular within Not for Profit (NFP) organisations.

What is the purpose of Goals, Values & Expectations process?

The purpose of the Goals, Values & Expectations process is to establish the motivations, needs and desires within a Board / Team and what areas of expertise are to be sought to compliment operations and existing capabilities.

How does the Goals, Values & Expectations process work?

The process works by having participants, e.g. a Board, share their views and opinions and areas where opportunity exists for development. The interviews are informal, confidential and results are presented back in a report and moderated discussion forum.

What is the outcome of the Goals, Values & Expectations process?

The outcome is informative information to help a Board / Team better themselves. The output is usually in the form of a value-adding report and workshop.

Who should partake in the Goals, Values & Expectations process?

Participants are those that want to be engaged and are looking to address issues in the operation of a Board / Team. The focus is often on the Board and Executive Leadership.

What is the confidentiality within the Goals, Values & Expectations process?

The process is in strictest confidence. Results are compiled without names being attached and a consolidated view is taken.

3 Recipe

A recipe for the process of looking at Goals, Values & Expectations of a Board / Team / Group / Entity as part of the Operational Framework for Board – Executive Relationships. For



person, including the interview, results compilation and stakeholder engagement is as follows. Remember:

- It is the view of the participant that is important and NOT that of the facilitator.
- It is the outcomes that are important for the participant.
- The significance to the participant lies in transferring the tool and the expertise so that they can use it for themselves.

Ingredients

Briefed participants

Capable facilitator

Copy of Operational Framework – Goals, Values & Expectations Questionnaire

Informal atmosphere away from distractions

List of functions the entity is responsible for

Instructions

1) Facilitator to take participant(s) to an informal atmosphere away from distractions.

2) Facilitator put participant at ease and ensuring a non-threatening engagement.

3) With a focus on listening to the participant, facilitator asking open ended questions around the entity, its function and operation to complete the table in the Operational Framework – Goals, Values & Expectations Questionnaire.

4) Complete the document in plain English, with highly pragmatic focus looking towards the transfer of expertise to the participant.

4) Facilitator return questionnaire results as soon as possible to participant for peer review.

5) Facilitator to discuss issues and revisions with participants and advise of next step in the process. Remember it is the participants view that counts and NOT that of the facilitator.

4 Types of Questions

The following are examples of the types of question to include within the conversation.

4.1 Values

- Why are you involved with this Not for Profit?
- Can you describe what motivates you?
- Can you describe your values?
- What values do you look for in your colleagues?
- What do you think motivates your colleagues?

4.2 Goals

- In your own words, what is the objective (goal) of the organisation?
 - Goal: to be rich



- Strategy: to buy and sell real estate in Perth
- Plan: how to realise strategy
- In your own words what is the strategy of the organisation to achieve that objective (goal)?
- What do you expect to get out of this involvement?
- What do you expect your colleagues to get from their engagement in the organisation?
- What do you want the organisation to achieve from this exercise?
- What do you see as some of the barriers to the organisation realising its goals?
- What do you see as some of the personal challenges you wish to address?

4.3 Expectations

- If there is one thing you want from this exercise what is it?
- If there is one thing you want from your colleagues what would it be?
- What do you want to get out of this exercise personally?
- What do you want to get out of this exercise for the organisation?
- Are you finding this exercise of use?



Goals, Values & Expectations Questionnaire

Completed By:

Date:

Personal Details

Details of the party being interviewed include:

| | |
|------------------------|--|
| Name: | |
| Position Title: | |
| Business Area: | |
| Organisation: | |

Goals, Values & Expectations

Details of the goals, values and expectation of the party include:

| | |
|---------------------------------|--|
| Goals - Personal: | |
| Goals – Role: | |
| Expectations - Personal: | |
| Expectations – Role: | |
| Values: | |
| Frustrations - Personal: | |
| Frustrations – Role: | |

| | |
|-----------------|--|
| Comment: | |
|-----------------|--|

