

Take on Board Podcast – Episode 239

Transcript – Alex Patterson uses a team charter to help her team and board work better



Helga Svendsen 0:00

Today on the Take on Board podcast, I'm speaking with Alex Patterson about using a team charter or maybe developing a team charter to establish ways of working, setting expectations and building accountability.

Before we start the podcast today, I'd like to acknowledge the traditional custodians of the land on which we record. For me I am on the unseeded lands of the Wurundjeri people of the Kulin nation and I pay my respects to elder's past and present and any First Nations people that might be listening today, I acknowledge their continuing connection to land waters, skies and culture. I support the Uluru statement from the heart. Despite the referendum results, so voice trillion truth and I encourage others in the Take on Board community to do the same. I continue to stand in solidarity with First Nations people for reconciliation.

Now, let me tell you about Alex. Alex is on the board of WASH House Incorporated, and not for profit that provides services for women in the Mount Druitt area dealing with domestic violence and poverty. She is a degree qualified chemical engineer, and has worked for a dual listed global medical device company for well, almost a couple of decades. Her roles in operations, quality assurance and medical affairs have given her responsibility for systems like Global Post market surveillance, organisational design, and leading multidisciplinary teams. Her company's focus is devices for home use with a mission to reduce the load on hospitals, emergency departments with high quality respiratory therapies that are easy to use and comfortable. And as I said, She's recently joined her first board with a not for profit, the washhouse. So welcome to the Take on Board podcast. Alex,

Alex Patterson 1:37

Thank you for that lovely introduction Helga, it's really lovely to be here.

Helga Svendsen 1:41

There's so many things for us to talk about. But another one of them could be chemical engineers in the boardroom because there's not enough of them. And it's another form of diversity. ,

Alex Patterson 1:50

Oh it is. And I've always found it's funny. We're chemical engineers turn up because they turn up in funny places, not just in petroleum refineries. They do turn up in banking and consulting and medical device companies as well.

Helga Svendsen 2:01

And the boardrooms, the boardroom? Yes. Before we dig into this conversation, developing the team charter to establish your ways of working. As always, we just want to dig a wee bit more about you. So tell me, Where were your parents born? And do you know where your ancestors are from?

Alex Patterson 2:19

Yeah, I love that question. So my dad was born in England, and my mum was born in Sydney, Australia, and he came out when he was about four. But he actually grew up in Nauru, when it was still a functioning mine for phosphate - we know for a lot of other reasons now, but they made in Sydney and was born here, but grew up in Queensland, just on the edge of Canberra.

Helga Svendsen 2:46

And in fact, just nipping back to your dad. Does that mean Was he an engineer as well if he worked in mining on Nauru?

Alex Patterson 2:51

No, my grandfather was a Harbourmaster for the ships, but he was wanted to be electrical engineer didn't have too much fun at Uni ended up being a maths and computing teacher. So definitely had a little bit of that technical brain bit in maths, physics. And my mom was a teacher and a lawyer. So she had the word brain a good mix for me.

Helga Svendsen 3:14

Okay, so you said you grew up in Queanbeyan? Siblings? Tell us about the family?

Alex Patterson 3:18

Yes, I've got one sister. She's seven years younger than me. Then I left home at 17. So I always feel like oh, I left her when she was just 10 years old. And we had a short, a short time a childhood together. But there's two of us and she's in Sydney. Now. With me. There's just the two of us.

Helga Svendsen 3:35

My oldest sister is seven years older than me. And she also moved out. I think she was about 18. So I was just a kid. Then although childhood relationships, we didn't get along so well when I was a kid. So maybe that was a better thing.

Alex Patterson 3:46

No, it's totally true. And we do get on really well. Now she works for the EPA. She's groundwater experts that she's very, very science technical woman does lots of really technical assessments of sites and pollution. So we've technical family will actually Queanbeyan who are the traditional owners, they're Nanowall people in Canberra but the on that Queanbeyan side, it's the Ngambri people and that's their country goes up towards what we call Lake George. So if you've ever driven that Sydney, Canberra, drive, you go past Lake George, and that was called Weereewaa, is the traditional name for that area. And that's where the Ngambri people, where there's a lot of lovely rivers in the area that they would have made you stop and been able to make quite a nice life there.

Helga Svendsen 4:34

And how many languages do you speak?

Alex Patterson 4:37

I can carry out a conversation in French so English speaking. But I was so lucky that as a young engineer, I was sent to work for a water treatment company in France for a year. And I decided to go full immersion which is best viewed in retrospect, I would say but I did manage to learn French and a lovely experience for an English speaker because I said like I was in meetings French, no one spoke English to me. And I really understood how I felt like I had a different personality for that year because I wasn't able to fully have my sense of humour or have the sophisticated conversations that I could have in English. And I was like, Oh, I had a new empathy and compassion for people who come to Australia and have English as a second language, like, I probably have been not understanding what the effort that you're putting into learning my language and working with me in my first language.

Helga Svendsen 5:32

That is so interesting. So you can communicate for all of what you need, but not those deeper conversations.

Alex Patterson 5:38

And so you know, when we when English you sort of think, like, you can think about how we want to frame things. And you can think, well, a better way for me to say this is like this, or if I express it this way, but for a lot of that time, I was like there was one way with whatever was possible for me, and it would be abrupt. It could be simplistic. And so I understood sometimes that that that happens with us as well. And when we understand our language to a really deep level, you can make these very sophisticated arguments, when people over influence so much harder when it's a second language.

Helga Svendsen 6:12

Absolutely. Well, says I agreeing, but I'm one of those Australians that unfortunately only speaks one language. I've delved into learning Italian on Duolingo. But I'm not sure that that counts for being able to have a conversation.

Alex Patterson 6:25

That's probably good. But I do say, I think that immersion, it speeds things up and the speed, yes, but I love to try other languages into your lingo too.

Helga Svendsen 6:34

So finally, tell me, where do you feel your home is, or your place?

Alex Patterson 6:37

Interesting, because I think I've been in Sydney for quite a long time, I came to University in Sydney. And that's a long time ago. And now finally, it took me a long time, because I wasn't a city person. I grew up in country, New South Wales. And that was part of my identity for a long time. But now I definitely think I feel at home in Sydney, I would find it hard to leave. I don't know why. Because it's, you know, it's not perfect. That costs too much to live here.

Helga Svendsen 7:03

Takes a long time to get across town.

Alex Patterson 7:05

It really does the traffic, the parking all of those things. But that is where I think of home now.

Helga Svendsen 7:10

Well, with your Sydney life part of your Sydney life now is, as we mentioned at the top of the episode is joining the board of WASH House. And we had this conversation. So folks that Alex is in the Take on Board accelerator program this year. And somehow it came up I can't quite remember how but you had said that your board developing this team charter was a really helpful way of, as I said, establishing your ways of working setting expectations and building accountability. And when you mentioned that in the program, and like oh, Alex, we must talk about that on the podcast. So that's how this came to me. So thank you for saying yes.

Alex Patterson 7:46

It is a topic I enjoy talking about because we've had such a positive experience with it. And it really broke down some barriers. So when you're in a, a board group, and this is a group of women really motivated, really care about this organisation. And yet, sometimes we would find it really difficult to communicate, especially outside of the board meetings. And the work was really hard, it was clunky and a bit inefficient. So we'd use this at my work my day job, especially during COVID. And when you've got global team, so I said like, how about it, guys, maybe we could do this. I feel like they were really kind and let me do it that they weren't really convinced to spend his time because there's so much work to do. The meeting time is precious. But okay, we'll give it a go. And so I use something that I had used before with my team that was really effective that I got from Nero, which is a whiteboarding software, but you can really find these everywhere. I mean, it's great to get a facilitator. But if you do an internet search, you can find a few ways of doing this. And this one, just made you answer some questions about yourself, and delved into some areas about how do you like to work? And maybe what your sensitivities are? When are you most productive? What are your superpowers? And I guess I'm probably in towards having a bit of fun with it. And but you can say, what are your strengths? Or you can talk about what skills you bring, or what assets if, depending on what how you feel comfortable. And it was really nice, because I think we are used to having our resumes and we have our skill sets that that are quite formal. And there's nothing wrong with them. And you have a constitution in a way that meetings run that do set up some structure. But sometimes you just need to get to know the people that you're dealing with.

Helga Svendsen 9:29

All right, so you're relatively new on the board. Conversations are going along. Okay. But you think there'd be some help in the team charter? They? I think what I'm hearing is they kindly humour you and go all right, Alex is new to the board. Let's do this thing that she wants to do. I don't think we've got time for it. But whatever. We'll agree to it. So well done them on at least doing that. So what were the steps I'm hearing you're going to mirror you've got a bit of a template. Was it done in a board meeting? Was it done in a different session? Did people have to do some work prior before they came? I mean, walk us through the steps.

Alex Patterson 10:02

I think that I gave them the chance to do it upfront. And I did it upfront as well. So I said, here it is his and I would say, like I put myself out there was a bit vulnerable and said, Here's my answers to the questions. And I think one other person did it upfront, that's fine. This part of what you're trying to do is really gauge a bit of the busyness and how much time people have for this. So I always like, I mean, that was like information, to me, the fact that they weren't able to do that pre work. So I was like, okay, that's fine, don't have to do it, it's fine work. I don't want to add homework to you're already having to read the Board Papers. So we are at the end of one of the meetings that finished in a reasonable time, we went through it. So we just did a really quick version, used minus example. And then there was this momentum, because I think you'll find that I sort of said, the things that I said, Well, you know, how do I like to work like, I'm a really good speed reader, I would whiz through documents, but I'm not the best at detail. So if you asked me to review something in detail, I'm gonna be like, okay, but I'm much more consuming big lots of information. And you can have other people say, I love detail. In fact, I can get too focused on detail in how I work. I would also say, I like you to tell me what the ask is. So I want you to tell me what you want me to do. And help me understand the urgency and the deadline, because especially this is a volunteer board, and everyone's really grateful for each other's time. And so I wanted to sort of say, Look, we're here for a reason. So if you need me to answer within a day, tell me, if you need me to just thoroughly read this document and find all the spelling mistakes, just tell me know that I might, like, if you don't, I probably going to skim it and go like, that's great. And other people came back then and said, it was just really interesting. Because when you sort of you leave with that vulnerability, and you say, like, I'm not perfect. And here's things that make me sensitive, here's things that other would say, Well, yeah, I actually want to own their mistakes. And I don't like people to act like they're victims. And that was really good to know. Because I think that it just helps you flesh out this other person that often only seeing on Zoom or teams these days. Other people were saying, I think someone's being passive aggressive, I get really triggered by that. And I react really strongly. Another really key thing was I said, like, if I'm a morning person, my best work has done in the morning. And so these meetings were our board meetings during the evening, at the end of it, I'm really close to being tapped out. So whereas other people are night owls, and there'll be just like at the end of the meeting going, Ah, let's can everyone stay on for a bit? No, thank you for putting that out there that it just helps to sort of, we felt comfortable, there was a lot of laughter. So that was probably, it was a quick version of it. 20 minutes, I've done it with another group where you spend a whole hour and you can really delve into it. But for that 20 minutes, we established that there are some board

members who really don't get to read emails during the week. So if you send them an email during on a Monday, you're not going to get a response to them on set until Sunday. And so you're not going to get as frustrated and going like, why haven't they read it? And it was enough of that that then said, in future board meetings, we would bring it up and go oh, yeah, that was really cool. Like I realized, like, I'm the only night owl on this board. That wasn't me or someone else. And you guys are onboarding people. How funny is that? Some really beautiful moments.

Helga Svendsen 13:28

So it's interesting, in my head, the board charter or team charter was and I guess there was this to some extent, but was everyone agreeing about what to do? But it sounds like there was lots of the individual, you know, here's how I work, things that you've been saying, I don't check emails during the week, if I don't know, presumably, the second part of that was if it's super urgent, you need to text me or call me or whatever it may be, or I don't do it in the morning, or whatever it may be. How did all of those individual preferences then come into something that was your kind of team rulebook?

Alex Patterson 14:00

So the next step? If it is such a say, is you then say, well, we've put all that out there? How are we going to make decisions? Because it then tells you that we're not going to be like in a workplace where you can possibly like, do an email round and get a decision outside of a meeting upfront to how are we going to make decisions, and therefore we would leave appropriately lead times? And then we would also say, what is our way of communicating and that you end up in a compromised position existing? What's everyone's comfort level? So we still communicate largely with email. But once you've established that, then there's less confusion. And someone might have said, if it's really urgent, you'd better text me because I won't see those emails. And so you sort of establish some those things. It's okay. Sometimes we have to communicate by email. But we know that if it's time sensitive, we're not going to get our board members on board with that outside of the meeting. And the other thing would be is if if Board Papers go out late, there's a good chance is that half the board? Well, I've had a chance to look at them before the meeting. So you do, it helps us to establish some of those rules. And you can write them down. And it just depends on the group that you're in. But thinking about other examples that I've talked to about people can say, does everyone feel comfortable with a group chat, because some people are super comfortable with that another who believes I can't have those notifications going off on my phone? And that can be a good thing to agree on to say, Okay, we as a collective thing, we won't do that. And we'll agree to use by the it's not perfect, because people have their preferences. But it does, it really helps. Particularly in that, I think, particularly the volunteer space. I know you have more experience on a broad range of boards, whereas I'm in this volunteer thing, where it's like, how much can we ask of these volunteers? Can we put these rules on them, we're already so grateful for their time, I do think this is really helpful to build accountability for those volunteers and say, we're gonna go through this exercise, you had the chance to save preferences. This is what we're committing to.

Helga Svendsen 15:59

I'm interested well, actually side note, I think for all board directors, because you're not full time in the organisation, often there is a lag of, you know, if I'm facilitating a workshop for a day, I'm not checking my emails. And if there's something super urgent, I just will not see it, or might put off the like you the detailed work I normally put off until the weekend when I've got a chunk of time that I can just sit and delve in it. But I'm interested in that side about the accountability side as well, for whether they're unpaid board directors or paid board directors, how did building this team expectation, I guess, and having this better understanding how did that impact accountability in your board?

Alex Patterson 16:38

I think it's improving all the time. I think it is a challenge that we are all women have different black stages of life, which I love. And I think that is the thing about diversity in boards is actually the fantastic sort of super people that you have of like, people who are putting their kids to bed at the time of the board meeting versus taking them to soccer training versus just come home from a 10 hour day versus someone I'd be retired, like we're all different. And so but I think it's still a challenge, to have accountability and to really, but I will be someone that believes that. There's a little bit of individualization in that too. And really, what you want to be able to do is to be able to have an open conversation that says, here's what we expect of each other. And I hope that we can keep coming back to it. And it's not a one and done. You have to keep going back and recommitting.

Helga Svendsen 17:33

Well, I was going to ask about that. So you've had the conversation about your individual preferences, I guess, and most technical term most all of them together. You've had the conversation about how you make decisions. What is your board chatter or your team chatter? What's the finished product look?

Alex Patterson 17:49

It's a screenshot that we all share. And when someone knew that it was shared with them. So it was it was nice, but I think that as I prepare for this episode, and I prepared for this, it did say to me that it's something to refresh. And I will go and test or go test their generosity with me again, to say, how about we do this again, because things change, and we can fall back on assumptions and our life circumstances change. So I think that it doesn't leave it anywhere doesn't sort of we don't bring it out all the time. And so therefore, I think it is, would be a good idea to go back in the beginning of next year. I love the beginning of the year, I love a January reflection sets of intentions, and everyone feels a little bit fresher ethic to go and do that all over again.

Helga Svendsen 18:34

Does it even though it's not in the Board Papers each time or have people stuck to it, it still feels like it's live and made an impact. It might never refresh early next year, as you say it's a good time to do it. But has it had that impact on the way people work, even though it's not overtly referred to?

Alex Patterson 18:51

I think the impact that I think it's had is mostly when the things that we do outside of the meeting, are usually reviewing policy documents. And that just seemed to take a really long time. And just that we have been able to just close out a lot of those and get all the inputs. And then that's happened a lot faster. And we've moved through that. And we've closed out a bunch of work as a result of clarifying how to actually Network One of the things that can happen in a group email is you can want to someone can want approval in the form of saying I approve of this document. But I might do and say like looks good to me. And so I might say like, is that approval...

Helga Svendsen 19:32

Sending a thumbs up emoji? Like what is that?

Alex Patterson 19:35

And so I think that part of just even finding out about the women that I'm working with and how they look at this is made me being very, I realized, if I'm doing that, I will say this is good to go from my point of view. I have no more comments on this document, just to be more explicit. I said I wanted people to be really clear on the Ask with me. So therefore I need to go and do the thing and say I Be really clear about my opinions and decisions and the things that I'm making and support the engine of this document. So I think document reviews have been, have been a lot better. And we've seen a lot more delegation of tasks to other people, because there's trust, because I think once you understand a little bit more about how people work, you actually go, Oh, okay. If I give it to her, I know she's probably doing this in her evenings. And it'll take her a couple of weeks to do it. But if it doesn't happen in two days, I'm fine. Like, there's, there's an element of being able to go like, Yeah, I kind of know who I'm giving that task to, and therefore, the delegation has been much better.

Helga Svendsen 20:37

Yeah, it is interesting, just knowing more about the people you're in the room with, I think I said this recently on the podcast, but for one of my boards, we recently had a session, where we just all brought something with us that kind of signified why we are who we are. And so people brought all sorts of things, you know, we had one person bring all work photos, and somebody else brought his

plectrum along because he's into music and cards from children, and all sorts of stuff. And it just gave us a deeper understanding of who was in the room, which means we're more likely to work together well. And it feels like part of what you did was learning about each other, and developing the ground rules for how you will work together.

Alex Patterson 21:15

Yes. And I think that in that this is spectrum of what you can do with this work, which stuck in it can be just like an icebreaker, what I would call an icebreaker of that thing that just says, give me a few more facets to your personality from the person that shows up for these meetings through to really specific things. And when like, in our exercise, one of our board members shared, she was like, we do this at my work. It's so cool. And they create a user manual for them. It's like so that would be here's the user manual for Alex Patterson. Here's what I love to talk about. Here's my skills. Here's where I'm most productive. Here's my Myers Briggs profile. Here's five words to describe me. And so they've gone all out. And I've thought that's fantastic. Could I get this very busy women to do that? I'm like, No, that's something that would probably take a few more hours to do. But if you weren't looking for these things, there's a huge array of frameworks and things you could use to do it with, with your group with your board. And yeah...

Helga Svendsen 22:10

So, they'll humour you for a short session, but there might not humour you for the longest.

Alex Patterson 22:15

I don't think I would have got, I reckon two hours would be great. And then you'd have this beautiful artifact and you could, I would like to have it and it could be part of the agenda. And but that maybe works better with a corporate work environment where you're all paid to be there and it's mandated, you make your work with the group you have for purpose. Fit for purpose is a great word. Yes.

Helga Svendsen 22:37

Oh, Alex, so much good stuff in here. I knew it would be good story. I'm glad I picked up on it in that session. So one of the key things you want people to take away from the conversation we've had today?

Alex Patterson 22:48

I think it's to make some time. So there's a broad match make some time to do this. People might be squeamish people might feel like, Oh, do we really have time for this? Next time? Because I really believe whatever is on the schedule you do, you'll find some value with it. I'd say like, lead with vulnerability works for me. So I just said I put myself out there. I'm not very good with detail. I am a morning person. I love talking about risk management. I love talking about data analytics. And I want you to be clear what you asked me. So put myself out there, put yourself out there and see what happens because it does snowball into people having been quite open with you and maybe having a bit of fun.

Helga Svendsen 23:29

Is there a resource you would like to share with the Take on Board community?

Alex Patterson 23:32

I think you can find these kinds of things everywhere. Like I said, Miro is a whiteboarding software and I love their team chatter template. But also I'm a big fan of it, the Atlassian Team Plays and they have a working agreements play that's very similar that sort of says how we committed to each other to get work done. I think like a lot of the management consultants who are so big in the news right now, great people, they've also got a lot of free stuff on there. So I think have a look at those ones. I really like.

Helga Svendsen 24:01

Fantastic. Well, the Miro one that you used is now tried and true because you used it. So I'm pretty sure they're free resources too.

Alex Patterson 24:10

So you can get a free license for that. And you can do stuff on it for free for a short time.

Helga Svendsen 24:15

So alright, we'll dig them out. And we'll make sure there's a link in the show notes as well. Oh, thank you. Thank you so much for taking the time to share your story and share your wisdom with the Take on Board community today.

Alex Patterson 24:26

Oh, it's really great to be here. Thanks so much. And yeah, I'd love to hear from people if they've had any experience with this too.

Helga Svendsen 24:33

So yeah, let's start the conversation over in the tech on board Facebook group as well to continue it. Yes,

Alex Patterson 24:38

Let's do that.

Helga Svendsen 24:39

Thanks.

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