

final report

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Key indicators and evaluation framework for natural resources management programs and projects supported

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Introduction, Rationale and Objectives

On 15 February 2006, Lewis Atkinson, Manager Innovation Strategy and Adoption, convened the first meeting of the MLA NRM Learning Group. This select team of internal experts agreed to develop an evaluation framework for natural resources management in the meat and livestock industry, with specific emphasis on MLA business.

In the previous 12 to 18 months, MLA research into existing frameworks found that whilst there was a lot of data being collected and analysed at all levels, an integrated NRM framework did not exist. Monitoring, managing and being able to articulate reductions in the environmental impacts of meat and livestock production across the whole supply chain is an increasingly critical area for this industry.

The MLA realised that it was strategically positioned to take a leadership role in the industry for the benefit of its members.

Rather than adopting the usual approach to research projects where external consultants are engaged to deliver solutions, Lewis chose to draw on the expertise within the MLA to build on an existing internal capability. He constituted a crossfunctional team in which each member contributed their individual knowledge and expertise across the range of issues in natural resource management (NRM). The objective was to develop an agreed evaluation framework with an holistic approach. It was hoped that the pooling of such a range of expertise, across the various research sectors as well as communications and marketing, would mean that critical learning about one another's perspectives could occur.

Larraine J Larri, of Renshaw-Hitchen and Associates, was engaged as the facilitator for the group. Her role was to implement Lewis Atkinson's objective by providing the structure and process for a series of six meetings.

This report is a summary of the critical learning that occurred throughout the project. it is also a review of the degree to which the project achieved its facilitation objectives which were:

To provide facilitation to an internal learning group that supports the group to:

- 1. Address the Task i.e. to develop and pilot an agreed evaluation framework for natural resources management in meat and livestock
- 2. Address the Process i.e. to develop individual and group capability as a 'Learning Group'

The Project Team and the way it worked

The project team, which was referred to as a 'learning group', had the following attributes. It was,

- a cross-functional constituency where each person represented a different area
 of MLA business unit expertise from on and off-farm meat and livestock
 production across the supply chain; as well as the communications and
 marketing areas.
- representative of different levels in the organisation
- a small group of around 8 to 10 staff
- people who could contribute critical thinking skills and challenge assumptions

The following members were involved in most of the meetings and the overall process:

Participant Name	Role / Position
Michelle Kellaway	Manager, Environment Animal Health & Welfare
Wayne Hall	Manager, Northern Beef Live Exports Feedlots
Stewart McGlashan	Program Manager, Environment & CoProducts
Cameron Allan	Project Manager, Pastures & Resource Management
Malcolm Sedgwick	Environment Project Manager
David Thomason	General Manager Marketing MLA Media Affairs
Lewis Atkinson	Manager, Innovation Strategy & Adoption
Jenny Sparks	Events and Communications Co-ordinator
David Pietsch	

The group agreed to participate in a series of six meetings, roughly one per month. Each meeting was structured in two main parts:

- 1. Discussion about the development of the NRM evaluation framework which included: understanding the current situation then defining and refining the scope, nature, content, purpose, audience, key stakeholders, future implications for MLA.
- 2. Reflection of group and individual insights as a result of the discussion in point 1, in particular, insights about group and individual learning.

This style of meeting drew on adult learning principles and theory described in the diagram of Kolb's Learning Cycle (on the following page, see Figure 1) and the following features described in Box 1.

Box 1: Adult Learning Principles applied to group processes

Five basic assumptions about adult learners (Malcom Knowles, 1984)

- 1. adults strive for autonomy and self-direction;
- 2. adults learn through using their own and each others' experience:
- 3. adults become ready to learn when they experience a need to know or to do something in order to perform more effectively in some aspect of their lives;
- 4. adults have a task-centred or problem-centred orientation to learning; and
- 5. for many adults, the internal motivators of self-esteem, increased self-confidence, and recognition are more potent than the external motivators of promotion, salary increase, etc.

Essential elements for adult learning applied to groups (McGill and Beatty, 1996)

- the individuals engage in a continuous process of learning and reflection that is supported by colleagues with the intention of getting things done (i.e. solving a problem);
- learning through experience by thinking through past events (and / or research), seeking new ideas that make sense of events (and / or research) to help find new ways of doing things better;
- learning how to critically reflect in order to generate new perspectives and innovatively solve problems as a team;
- the group has a learning facilitator who ensures that there is a challenging and supportive learning environment that is characterised by trust and confidentiality;
- group membership is voluntary, autonomy and ownership by the individual and the group is encouraged.

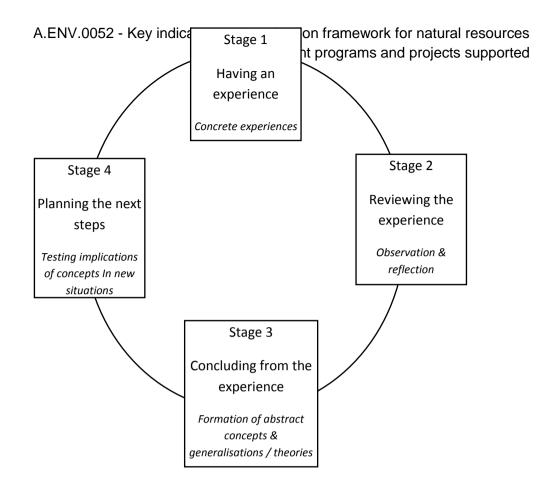


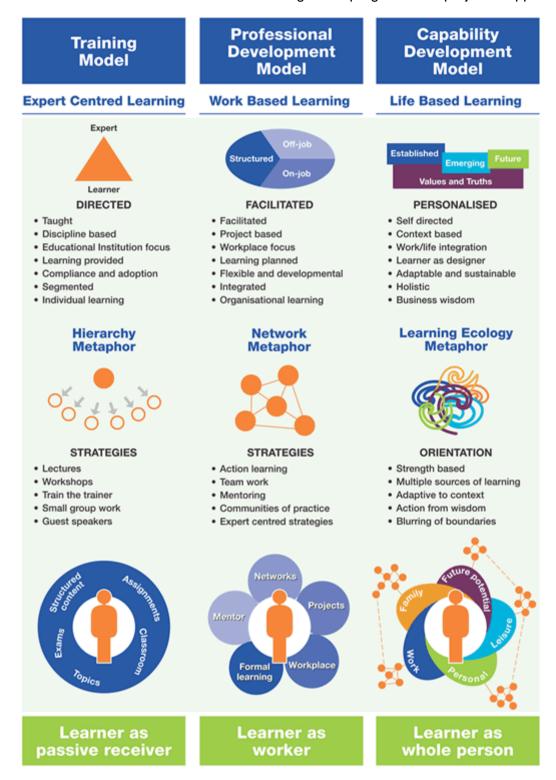
Figure 1: David Kolb's "Cycle of Learning"

Engaging in a four stage process in learning from experience

Figure 2 (on the next page) is a representation of the current models in approaches to professional development that relate to adult learning in the workplace. It represents three different approaches to knowledge management in organisations. These are:

- Training Model Expert centred learning
- Professional Development Model Work based learning
- Capability Development Model Life based learning

Thus the context for this project was firmly placed within the second model where there is an emphasis on developing a network through a project based, flexible, developmental approach.



Life Based Learning: a model for integration, growth and potentiality. © TAFE NSW ICVET

Figure 2: Current models in approaches to professional development

From 'Life based learning: A strength based approach for capability development in vocational and technical education - Research Report May 2006' Staron, M, Jasinski, M, Weatherley, R, (2006) TAFE NSW see http://www.icvet.tafensw.edu.au/ezine/year_2006/jul_aug/research_lifebased_learning.htm

How successful and worthwhile was this style of project team / learning group approach?

This question will be addressed by looking at the evaluation data that was collected both during and after the project. The data consists of:

Formative assessment

Reflections at the end of each meeting considered what was learnt and how the group was progressing in its thinking about the NRM framework.

Summative assessment

Comments in the final meeting where the group considered what had changed overall; and brief telephone interviews conducted with each participant within one month after the final meeting.

Reflections during the process - Formative assessment

In the first meeting the group considered that it had successfully achieved its initial establishment phase by:

- developing an understanding of the extent of its collective expertise;
- beginning to understand one another's perspectives better;
- setting ground rules; and then
- developing an action plan.

The agreed action plan was based on identifying and then answering the following four critical questions which the group generated:

- Question 1 What do we want to achieve?
- Question 2 What do we need to do to get there?
- Question 3 How will we know? What will success look like?
- Question 4 What are the implications of what we are doing?

As a result of discussing Question 1, the group devised a model of *Stakeholder identification and their information needs*. This led to realisations about the focus for the NRM evaluation framework – i.e. satisfying DAFF information needs as the primary stakeholder would mean that other stakeholders information needs would be met. Another critical realisation was the need to ensure linkages with the MLA current and planned performance monitoring towards 2010.

Here are some indicative comments from the group that have been paraphrased and combined so that common themes are clearer:

A significant breakthrough occurred when discussion of industry versus MLA led to the real definition of problem – this happened in the last 45 minutes. There has been a lot of circling around the problem. We got over a critical hump and got a really good result.

We are working on an essential and important issue that impacts on all of us and it's good to be working together. There are efficiencies on working collectively in relation to reporting communication with consumers. There may be a way to fit together industry versus MLA perspectives.

We realised that there is a lot of commonality in thinking about the task and reporting about industry responsibility. We thought we are facing a barrier but this is not the case. This is good and we should be able to get a result.

Some people felt that the group has formed a sense of membership – others said, 'not quite yet'.

It's important to go to a free thinking process which explores left field stuff, exploring possibilities is important.

At this early stage, some people felt that the facilitation was sufficiently directive, others would have preferred a stronger approach.

Having an independent facilitator helps with the workload and group energy. It also meant that we were able to think flexibly, voice our frustrations, and change direction where needed.

The facilitator could have driven the process more by putting us into more defined 'boxes' with discrete process and tasks and pushed through.

The group then went on to implement its agreed action plan. At each meeting critical reflection and discussion meant that adaptation and modification was possible where required. The meeting agendas were determined collaboratively each time.

The 'external' facilitator supported the group by structuring the meetings (setting draft agendas), documenting the flow of thinking on butcher's paper, providing diagrams and models where appropriate to aid conceptualising, documenting meetings.

The convenor and leader of the group, Lewis Atkinson, managed internal MLA processes to enable the group to function.

During the **second meeting** the group clarified its objective as:

Developing a methodology to report and evaluate on NRM MLA investments (not industry, only stakeholder groups interested in MLA investment) and industry performance that will meet the information needs of priority stakeholders.

This signified an important step because it provided a logical, and justifiable agreed scope for the NRM Framework.

By the **third meeting** the group realised that they had created a viable approach to developing the NRM framework. This was possible due to having completed the *Stakeholder NRM Information Needs* matrix where eleven issue areas (or 'Fields of Study') were considered. These were:

- 1. water use
- 2. water quality
- 3. salinity
- 4. soil erosion
- 5. soil acidity
- 6. climate change
- 7. GHG emissions
- 8. biodiversity
- 9. weeds
- 10. feral animals
- 11. solid waste

It was during this third meeting that the group was ready to consider the structure of a paper to the Executive, with the objective of getting sign-off on the proposed NRM indicators.

The group realised that whilst it was developing an NRM framework, it also needed to consider who would be using the information and for what purpose (i.e. contextual issues affecting the use of the framework). This influenced thinking around who to consult during the ongoing development of this reporting mechanism. Also considered were the implications of data quality (e.g. attribution) where measures may be imperfect but the best available.

Indicative comments of these developments at this middle stage included:

There is greater understanding of the relationships in our supply chain and the implications for NRM. We have clarified a lot. This is important because we are all part of supply chain.

This means that we will be more aware of the ultimate products in terms of NRM e.g. water quality.

Each meeting so far we have come in sceptical and left feeling positive because we have achieved something – the level of scepticism about this project is decreasing.

In relation to the style of meeting, with its focus on learning, there was recognition that people were learning from one another to be able to address a unique issue because they came from a cross-section of business units. This enabled the group to:

Move out of the business of what we each do, and recognise that what we do has a higher level purpose or requirement in relation to company performance that impacts back on our work.

We are learning through meeting how to put something like this together, and how to use people around table.

The group stated that they had established a sense of shared responsibility within a relaxed atmosphere.

Having this group has allowed us time to sit down and hear one another's expertise.

Having an external facilitator is important because they keep the momentum, help coordinate and ensure the meetings are effective.

We have been applying different processes in thinking to get us to end point. We are more conscious about these processes now.

By the end of the **fourth meeting** the group identified some critical thinking and group process skills that they felt enabled them to be innovative. These related to:

Active Listening

i.e. being able to set aside one's 'agenda' or perspective in order to really attend to what the other person is saying and what that means in relation to understanding the problem or issue. This is sometimes referred to as 'tough-minded' listening. It also includes drawing on information and data from outside the group and using critical reflection skills to assess the usefulness of this information to the current context. An example of this is the following quote:

We are developing a tolerance to be able to hear two (or more) differing positions and reach a better understanding about the issue/s

Risk-taking

In relation to innovative thinking e.g. the 'thinking outside the square' that Peter Senge refers to which is only really possible when people feel a certain level of comfort and trust with one another in a collaborative, cross-functionally constituted group.

We had a brave discussion about 2025, we stuck our necks out. Asking 'So What', helped us to break the industry and work inertia – something that sits above our work and helps us focus on the big and long-term issues.

• Being prepared to commit focussed time to the 'social process'

i.e. realising that it takes a certain amount of time to be able to hear and think about one another's perspectives. This requires relationship building that competes with the demands of day-to-day work. This type of 'getting the job done' requires a certain allocation of time.

The most valuable thing has been the cross-functional collaboration in order to address a whole of organisational issue.

Another perceived benefit had begun to emerge by the fourth meeting. This was the transference and application of skills from the group to other work situations by some. In particular, in relation to *longer-term thinking*, and *getting others to own the process*.

The **fifth meeting** was replaced by a sub-committee group in order to draft the paper that would be presented to the Executive Team.

The **sixth meeting** occurred after the presentation of the paper to the Executive Team and was both an analysis and debrief of their response and a review of the whole project.

As a result of feedback from the Executive Team, the group realised that they needed to better manage the expectations of key stakeholders in relation to their understanding of the potential use of the framework generally and for corporate communications. They realised that they needed to further clarify its nature and scope. They felt that the following points needed to be included:

The NRM evaluation framework is,

- A pragmatic approach to monitoring
- A snapshot
- Useful for identifying and addressing 'Hot' issues
- · Reflects levels of investment
- A best guess in a highly complex area

The group felt that their next phase would be to develop a detailed work plan for each measurement issue area. They devised an action plan for this next phase and agreed to meet target dates in the next six months. They felt that they were now able to progress the framework without the help of external facilitation.

The next section looks at the group's summative assessment of their learning.

Reflections at the end of the process - Summative assessment

During the sixth meeting the group identified the key changes that had occurred in being able to address the challenge of devising the NRM evaluation framework for the MLA. The themes that emerged are summarised in the following table.

Table 1: Key changes identified by participants from beginning to end of project

Key Change	Evidence (Note: some comments have been paraphrased and combined where they related to the same theme)
From working as an individual on this issue to adopting a cross-functional team approach	The participants expressed the view that they had begun the process as individuals who were unsure about the potential of the group to achieve its objective, as well as being unsure of the nature of the task. By the end of the five months, they commented that their achievements included: having a strong foundation on which to build being part of a group that has a goal in sight committed to achieving the final framework developed an understanding of a group process through a series of small steps with individual action
Achieving a greater understanding of the nature of the problem	Most of the group felt initially unclear or overwhelmed about devising a framework for NRM in meat and livestock production across either their specific area (i.e. on or off-farm) and/or the whole supply chain. They needed to know more about how best to approach the issue. They now felt that they had a structure and concept of which directions to go. They had not yet achieved the final product, but were confident it was achievable. The following point summarises the comments that indicated this: We went from something without form, pattern or any organising features to a framework with linkages and interconnection

The group also identified the following **benefits** of the overall process:

- brought a group together to solve an important problem;
- the cross-functional composition of the group enabled people to actively listen to and consider one another's perspectives;
- kept the momentum going to achieve the first stage of development
- meeting face to face was more useful than telephone or video-conferencing;

 having a staged series of meetings over 6 months (rather than one intensive retreat) meant that there was time in between meetings to do work and think about the project.

There was some discussion about the usefulness of having a focus on 'learning' and calling the project a 'learning group'. The main points raised confirmed that most learning was in relation to understanding the nature of the problem better. It was agreed that calling the project a learning group generated interest and some initial 'buy-in' to the task, (e.g. in curiosity value), but may have been a distraction from the task. This issue was followed up in more detail in the post-completion telephone interviews.

Two to four weeks after the final meeting each active group member provided **post-completion feedback** during a telephone interview. Listed below in Table 2 is a summary of what people said in relation to the significant strengths or benefits of the project approach.

Table 2: Significant strengths and benefits of the learning group process identified by participants post-completion

Strengths and benefits of the learning group process	Evidence (Note: some comments have been paraphrased and combined where they related to the same theme)
The importance of having a cross-functional group to address whole of organisation issues	 It was important, critical to draw together a cross-functional group of such high calibre people to work on this specific issue of importance to the whole organisation. (All) We gained a much greater understanding of both the 'Research' and 'Marketing' business unit perspectives. This was a very important and critical development in relation to understanding NRM. This was a proactive approach that has led to a more realistic understanding of what can be achieved on both sides. What often happens is frustration in the midst of a crisis where we do not understand one another's perspectives. We grew to understand one another's perspectives. This was a proactive and focussed approach to an issue that needed to be addressed. (All) The issue requires a common approach across business units and 'silos' and we learnt that it is possible to achieve this through working in a cross-functional group. We were working to achieve a whole of company approach. We should be setting up a common system across the company for this monitoring and evaluation. (1) Developing better relationships with others from different business units has meant that it is now possible to draw on individual's expertise when needed, knowing who might be

Strengths and benefits of the learning group process	Evidence (Note: some comments have been paraphrased and combined where they related to the same theme)
	able to add value. We achieved the beginning of some necessary cross-functional engagement. It was easier for on and off-farm to connect well because they are both on a similar technical level. The relationship with communications and marketing will need more nurturing. (4)
	 I gained a better understanding of where my work fits into the whole supply chain and of what the priority areas should be. (2)
	Sharing and pooling of information from people across the organisation was very important. (1)
	Having a cross-functional group worked well. It was an important project that needed a response across the whole of the organisation. There will be other 'flagship' projects that need to be done across all functions to add value. (1)
	Important for the company to do, but only where there is a real need because there are already too many meetings. (2)
Learning more about the problem or different ways of thinking through working collaboratively	 The issue would probably not have been addressed in any other way. A group approach was essential. (All) It was an opportunity to focus on a critical gap that individually was of concern but in the 'too hard basket'. Working in a group meant that we were able to develop an holistic framework. People realised the ways in which NRM is
	 part of their work and how to now address their KPIs. (3) By the end of the first meeting the group realised that MLA needed a better reporting mechanism. During the second meeting and by the third meeting things had fallen into place. We had described and understood the need for this framework and developed a sense of ownership to working towards the product. There was some light at the end of the tunnel. (2)
	It has opened up the complexities and made us realise more about the problems and issues. (1)
	We can learn from another's approaches to problem

Strengths and benefits of the learning group process	Evidence (Note: some comments have been paraphrased and combined where they related to the same theme)
	identification and analysis i.e. marketing / communications approaches and scientific / analytical approaches. (2)
	That there are different ways to understand NRM performance indicators and a range of perspectives need to be incorporated into the framework to meet different stakeholder information needs. (1)
	Through working on this project it is now possible to understand what each of us should be doing that can have an impact to get a return on investment for our key stakeholders (e.g. DAFF). This will mean not doing certain things or doing others differently. (1)
	We could do so much more than we are already doing, but we can probably get away with less. Finding the balance and being prepared for the longer-term is a key challenge. (1)
	By working as a group we were able to address this issue in a more comprehensive and meaningful way than I thought was initially possible. We did this because we had people in the group with the right expertise. (1)
The importance of having an external facilitator who worked with an internal convenor	Having an external facilitator was good because it brought us back on track, channel us, pull and push us in the right direction, put a stop to things when needed Allowed for a much more free-flowing discussion without the leader of the group having to also facilitate. Meant that we were not locked in to one person's ideas. it was good to have a third party directing the traffic. Provided an organised agenda and made sure we stuck to it. (All)
	The facilitator was able to understand the issues and paraphrase our ideas, distil and record the conversation, capture and summarise the data. using butcher's paper and putting it up around the walls was good it meant that we could all see the way the discussion had gone, threads were not lost and could be built upon. (All)
	The facilitator managed the flow of conversation well, given that there were a range of people with different agendas, everyone was able to speak and contribute, kept the group

Strengths and benefits of the learning group process	Evidence (Note: some comments have been paraphrased and combined where they related to the same theme)
	focussed, steered the knowledge, challenged the group to consider the implications by asking 'So What?'(All) • Making time to reflect within the work of the meeting and as a group was useful (rather than what usually happens i.e. reflecting about one meeting while racing to another one). It forced us to talk about the process an not just focus on problem solving. (valued time to reflect as a group), it was good to leave a meeting with absolute clarity about what was achieved and what will happen next. It was good to push people into reflecting and evaluating the group's progress. (All)
	The meeting documentation and reporting was great. It made it possible to have a paper trail that followed the group's thinking processes and the decisions that were made at each stage. Getting the notes out within a short time after the meeting was very useful. People could easily see what happened and what jobs were needed to be done between meetings. (4)
	Lewe's coordination and leadership in getting the group together and steering it was essential. (4)
	Using an external facilitator was important. This would not have worked without facilitation. (3)
	The facilitator provided a safe group environment where people felt relaxed and able to contribute freely. (2)

Also identified were some opportunities for improvement so that this style of project fits better with MLA needs and operating style.

Table 3: Opportunities for improvement of the learning group process identified by participants post-completion

Opportunities for improvement of the learning group process	Evidence (Note: some comments have been paraphrased and combined where they related to the same theme)
The terminology of 'learning' was a distraction and a shift of focus from the project task.	 Never really understood the concept of the 'learning group' / confused about the 'learning group' concept (4) Whilst it was useful to hear some of the learning and process theory, at times this stifled the conversation. (1)
The group could have emphasised learning more	 Would liked to have learnt more about developing projects and concepts in a team environment. (1) Would have liked to compare a number of evaluation strategies, review and assess them, and learnt more about this through e.g. reviewing other frameworks. (Another person countered this view would probably not have been useful, would probably have been a dead end because the company had already decided on the overall approach.(1) Facilitator could have been more forceful in challenging the group more often e.g. by asking what is the purpose of this meeting? What preparation could we have done? Are we meeting our action plan objectives? (1) There should have been a greater insistence on review and reflection. The facilitator could have made the learning process more explicit. (1)
Group membership and ongoing commitment needs to be managed and structured	 Group membership varied, some people dropped out and were replaced. Perhaps there could be a core group that keeps the work going and then a broader group of affiliates who are invited in for specific discussions as well as being kept informed throughout. (2) Not totally sure that this project will progress and 'stay on the rails' and whether the group will have the momentum to continue – depends on the coordinator. (2) There could have been more activity between meetings to maintain interest – perhaps discussion initiated by the convenor, some pre-meeting background reading. The composition of the group changed and there was a potential for some loss of continuity, in particular in relation to the marketing and communications area. For example, this is reflected in the paper that was presented to the Executive Team which was more weighted towards the technical and could have included some measures related to community awareness strategies. (2)
Length of meetings could be varied through negotiation with the team	 Length of meeting time was a bit long, 2 hours rather than three. (2) The length of meeting time was good. (2)

There was general agreement that the learning group project approach was highly regarded and made a significant contribution to the success of the group in addressing this task. However, it was felt that the terminology of 'learning group' and the focus on learning that this implies is a detractor to people's full participation.

Calling it a learning group was positive because it captured people and they turned up, but it was also confusing. We learnt certain things such as one another's perspectives.

The early emphasis on 'learning' was excessive, it would have been better to begin the project and then build in reflection.

Interviewees suggested some alternatives to the 'Learning Group' title, these included: Crisis Group, Taskforce, Flagship Project, and Facilitated Workgroup.

One suggestion was to use the 'learning group' style for specific stages of R&D projects, such as the initial scoping phase:

Perhaps the initial scoping phase of a cross organisation project like this has more of a 'learning from one another' focus. Then the next phases could be done in a different way. The first scoping phase could try and clarify the issues from all perspectives, the stakeholder needs, the desired project outcomes, the preferred logic approach and then a project plan to be implemented.

Summary and Recommendations

In summary, in relation to the facilitation objectives it is evident that the group successfully achieved the first objective of developing an agreed evaluation framework for NRM in meat and livestock production in Australia. This framework was presented to the Executive Team before the final meeting. As a result, the group agreed to an action plan that ensured the further development and piloting of the framework, and also addressed the Executive Team's feedback.

In relation to learning from the facilitated process (i.e. the second objective), the group realised most strongly that a cross-functional group is required to address whole of organisation issues. This involves a shift from working as an individual to adopting a collaborative team approach where each person contributes their expertise and perspectives, as well as actively listening to the others. By doing this, the group found that they gained a greater understanding of the nature of the problem, and learnt more about different ways of thinking. Engaging an external facilitator to support the process is desirable during the early stages of group development because this ensures that the atmosphere is positive and conducive to creative problem solving and learning.

Suggestions for improvement related to:

- Changing the naming of the style of group from a 'Learning Group' to a Crisis Group, Taskforce, Flagship Project, or Facilitated Workgroup
- The facilitator emphasising the actual experience of learning as it occurred i.e. during the last 20 minutes or so of each meeting
- Managing and structuring group membership and ongoing commitment perhaps to define a core group with communication to a broader group
- Varying the length of meetings from between 2 to 3 hours depending on the group's views

Therefore, the facilitator proposes the following recommendations:

• Recommendation 1 - Naming the project

Consider avoiding the term 'Learning Group' when naming this style of crossfunctional collaborative project but still retain the learning group approach with end of meeting reflection on the process and what was learnt about the project.

• Recommendation 2 - External facilitator – internal convenor

Continue the use of an external facilitator for certain stages of a complex project where the group members are drawn from a range of business units across the organisation. Ensure that they work with the MLA convenor who has responsibility for driving the project, liaising with the team and the external facilitator to achieve project objectives.

Recommendation 3 - Determine strategic group structure and composition

Consider early on and at points during the process the strategies required for maintaining group membership. This may include considering that the group has different levels (e.g. a core group, and a wider group for consultation and strategic input) who need to receive and feedback communication about the work of the group.