ATLASSIAN Foundation

Ways of working guide for social impact teams

For healthier, more efficient and more effective social impact teams

Ways of working guide for social impact teams

Introduction

Social impact teams are under pressure to deliver outcomes for people and planet, often with limited resources. This guide is a curation of resources to help nonprofits, social enterprises, and professionals volunteering with them, improve their ways of working so that they can more effectively achieve their mission.

How to read this guide

Like all good self-help books we've identified 7 steps but in reality you may need some more than others, depending on your organisation. Improvement is not linear, so be comfortable with revisiting steps as you diagnose problems, experiment and learn.

Already working towards goals as a team? Consider jumping to reflection and experimentation.

Achieve greater impact together
Social impact teams are made up of talented individuals with ambitious goals but without the right methods for collaboration teams are held back from reaching their full potential. The Plays and practices we suggest in this guide will help you gather internal insights and learn from experts in teamwork to help your team achieve greater impact together.

Recruiting a coach from within or outside your organisation can rapidly accelerate your progress by helping you learn from what they have seen work or fail before.

If you aren't able to access or afford a coach (including volunteers), we encourage you to join the Atlassian online community groups like **Teamwork Lab** and **Nonprofits** where you can share your questions and learnings with other social impact professionals.
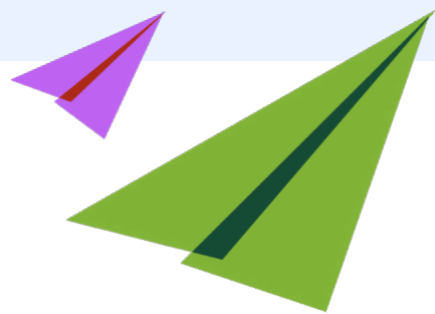
Start with why

1 **Identify goals and measures of success**

There are many tools and techniques for creating and maintaining goals including:

- **Product** & **Sprint Goals** in Scrum
- **Objectives & Key Results** (OKRs)

Review and experiment to find a way that works for your team and organisation - the most important aspect is that the way you choose works for your people and is something they can engage with.

This way down the rabbit hole...
If you're a leader looking for support in creating a compelling strategy that guides your team toward achieving their goals, take our free course on **How to Build Strategic Guidance**.

Atlassian tool tip: Use Goals and Projects in Atlassian Home to connect your entire team's work to goals and track your progress.

2 **Define team roles**

The most successful teams bring together a diverse set of people and share an understanding of the project's goals with agreed priorities. Each member of the project team has a unique contribution to its success and roles may include a project manager, project sponsor and team members.

The first step to improving your team's shared understanding is to clarify your team's purpose and function - we call this **Team Shaping!**

Pulling from **Atlassian's Team Playbook**, the freely available set of practices that fuel Atlassian's teamwork culture, **Team Shaping** represents a collection of four of these Plays focused on making sure that everyone on your team knows **what** they should be working on and, most crucially, **why**.

Those Plays are...

- **Team Poster:** Focused on creating a shared direction for where your team is going
- **Roles and Responsibilities:** Focused on building alignment on the roles within your team and the responsibilities that need to be taken on by each
- **Network of Teams:** Focused on understanding which teams your team relies on to get work done and the health of those relationships
- **Working Agreement:** Focused on making explicit how your teams wants to work together day-to-day

> **This way down the rabbit hole...**
> Looking for more guidance? Take this free course on **How to Shape an Effective team** to define your team's purpose, clarify roles and responsibilities, and create healthier communication and relationships (even with a remote team!).

> **Atlassian tool tip:** Create spaces in **Confluence** for each team and organise pages logically so you can easily find your work. Use **templates** to get started quickly on the Plays above.

Get (The Right) Stuff Done

③ Prioritise your work

It's rare that a team can do everything they, or their stakeholders, want them to all at once - and doing so would rob you of the opportunity to learn and improve along the way!

Break the work down into incremental chunks and make use of regular and ruthless **prioritisation sessions** in order to focus on delivering the smallest and highest value items first. You may like to use a matrix to assess work based on impact and effort, or prioritise tasks that directly contribute to community outcomes or organizational goals.

Decide what is required in your Minimum Viable Product (MVP) or pilot and try it out with your stakeholders or community quickly rather than waiting for the perfect finished solution. This will give you the opportunity to learn and iterate before sharing it out widely.

Try adopting a consistent framework with a clear logic on how to prioritise work. If you don't do this, priorities will tend to be dictated by one or more **frequent stakeholder characters**.
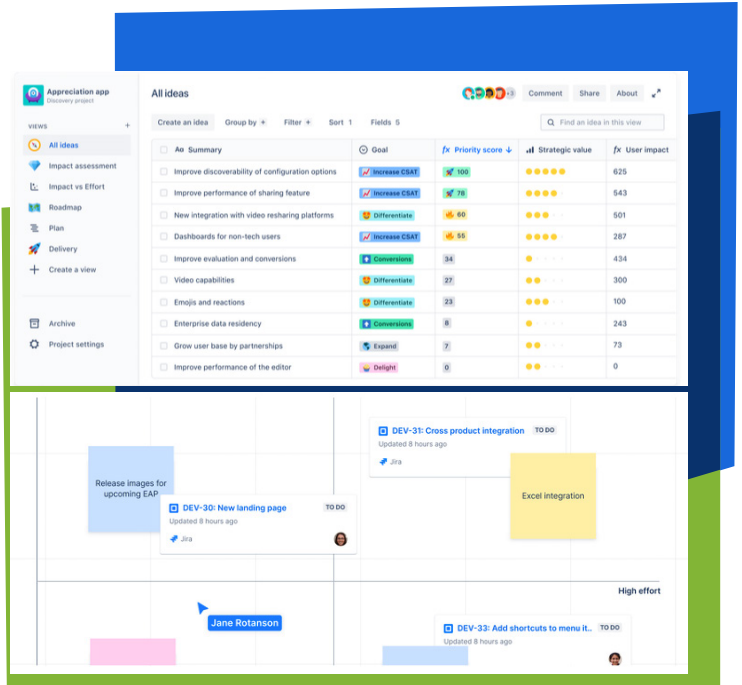

> **Atlassian tool tip:** Create whiteboards in **Confluence** and use the prioritisation matrix template or use **Jira Product Discovery** to assess all ideas as they are generated.

4 **Do the work**

Your aim is to get from "To-Do" to "Done" as quickly and efficiently as possible eliminating bottlenecks along the way, and limiting the amount of "work in progress". This will help your team maintain momentum, prevent multitasking and reduce mental clutter, making them more productive.

You don't have to be an **agile** team to deliver, but for anything other than small and simple projects, **the data says it's a good idea**.
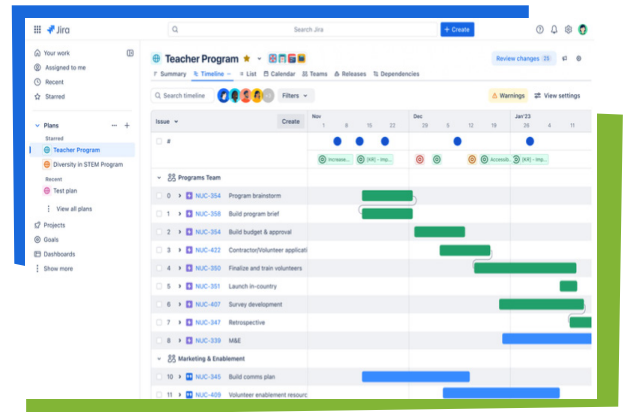
You can use frameworks like **Scrum** and methods like **Kanban** to help improve your team's ability to deliver – many of these also enshrine the other points in this guide like forming a goal, or regular retrospection.

> **Atlassian tool tip:** Create projects in **Jira** to track every nonprofit program and project from start to finish with workflows and task allocation.

During delivery, tools and techniques can help you gain an understanding of how work is progressing – try getting your team to add statuses to their work and using data dashboards to show how work is progressing.

It's also important to understand whether your work delivers the desired outcomes. Measure the results of your work with techniques like **OKRs** so the whole team understands how they are contributing impact.
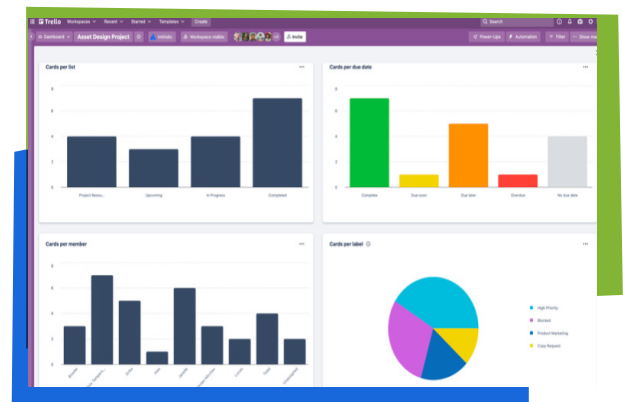
> **Atlassian tool tip:** Use the goals and Projects in Atlassian Home to provide status updates on projects and progress towards goals and increase the visibility of your work with leadership.

> **This way down the rabbit hole...**
> New to agile methodology?
> - **Manifesto for Agile Software Development**
> - **The 12 Principles of Agile**
> - **Kanban vs. Scrum: What's the Difference?**

Find 10,000 ways that won't work

5 **Reflect**

Atlassian's **2024 State of Teams Report** showed that successful teams stop to answer and act on these three questions:

- Are we working on the right things?
- Do we have time to make real progress?
- Is knowledge easy to find and understand?

In order to maintain good team health, teams should meet regularly to check in and make adjustments to ensure they are always working on their highest priorities. Create room for your team's continuous improvement — it can lead to your team being more resilient and adaptable to change.

Read through our **guidance on running a retrospective** (often called a 'retro') and use our **Retrospective Play** when you're a few weeks into the work.

8.7x

When nonprofit teams have processes in place to identify top work priorities, they are **8.7x more likely to be adaptable and resilient to change.**
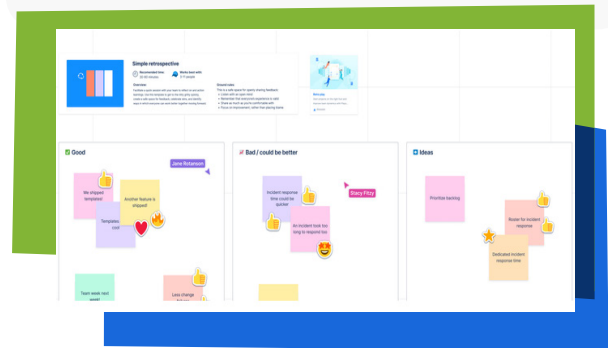
Atlassian tool tip: Use the simple retrospective template in **Confluence Whiteboards**

Beyond running retros, it's important to also reflect on your health as a team to make sure that you are set up for success. Complete the **Team Health Monitor** Play and collect some data on work performance to understand where your team needs to improve.

Atlassian tool tip: Use the Team Health Monitor template in **Trello** and reassess every 3 months.

We know that work performance and team health are correlated and so taking time every 3 months to take stock of how the team is tracking is crucial to success.

⑥ **Experiment**

Humans are creatures of habit and when it comes to changing our habits, it can be exhausting! But there is real value in innovating how your team works.

Use the findings from your team reflections to guide your innovation and experimentation. Make sure to have a clear, measurable goal that you are aiming to achieve from this experiment. Take screenshots or photos of the team doing the new process or activity and note data snapshots to show the impact.

Play recommendations based on Team Health Monitor findings

Here are some top recommendations of where to start with improving your team health, depending on which categories need attention from your **Team Health Monitor**. There are many more ideas on the **Team Playbook**.

Category needing improvement	Play
Team Cohesion We have the mutual trust and respect necessary to be an effective team for healthy collaboration. We have a strong sense of connectedness between members.	**My User Manual**
Balanced Team We have the right people, with the right skills, in the right clearly-defined roles. This enables us to successfully deliver the value for which this team is accountable.	**Roles and Responsibilities**
Encouraging difference We seek and voice different viewpoints from diverse sources, both internally and externally, and we take the time to respectfully work through points of difference.	**Inclusive Meetings**
Shared understanding We share an understanding of our mission and purpose and our key milestones to deliver our strategic plan effectively as a team.	**Team Poster**
Value and metrics We understand the value we provide and the value back to the business, our definition of success and how that value is tracked and measured. We ultimately leverage our metrics to make decisions and action as necessary.	**Goals, Signals, and Measures**
Suitable ways of working Our ways of working together within the team enable us to do our jobs effectively, whether we are distributed or co-located. This includes the tools we use, how we meet and collaborate, and how we make decisions.	**Working Agreements**
Engagement and support It's clear to other teams how and when to engage with us, teams do this effectively and consistently receive the support they need to progress. We have a clear understanding of who we depend on, and who depends on us.	**Network of Teams**
Continuous improvement We always make time to celebrate our successes as well as earnestly reflect on, take action against, and fulfil our improvement opportunities. We have regular and intentional feedback loops within and outside of the team to make improvement decisions.	**Retrospective**

This way down the rabbit hole...
Being honest, open and maintaining a solutions mindset doesn't come easily to all teams. You need a good foundation of psychological safety to trust your teammates enough to reflect constructively with each other.

It can take time, but here are a few Plays that can help you on your journey:

- **Team Connectedness** supports bonding with your coworkers and getting to know them on a deeper level.
- **Disruptive brainstorming** can build muscle memory for fielding differing perspectives.
- **Sparring.** Let peers challenge your ideas and inspire new ones.

7 **Scale**

Going well? Now roll out... or should you?

It can be tempting to rush to scale out exciting or successful practices across an organisation, but beware - trying to grow too quickly can lead to a mess!

As John List explains in **The Voltage Effect**, just because something is a good idea in one area, it doesn't mean you can make it work at scale by throwing more resources and people at it.

In teams, it's wise to give practices time to be adopted by the team and generate learnings before you attempt to share them out. If you're trying something new, probably give the first team 2-3 months to iron out the kinks, then cautiously add 1-2 teams for another period, and finally begin to scale after they have helped your learn more.

Consider how you might manage change, including for adopting new tools using this **guide and template**.

This way down the rabbit hole...

Various different scaling approaches provide tailored advice for this stage including:

- **The Scaled Agile Framework (SAFe)**
- **Scrum@Scale**

Also consider carefully if you need to get bigger, often focusing on descaling is equally good if not better for delivering value - read more in the **Descaling Manifesto**.

We'd love to hear how you found this resource!
Share your feedback

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Learn more at
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