

About Core Planning Teams

Why create a core planning team?

Almost all successful participatory projects start with a small group of people who care and hold the flame for the work. Often, in the rush to act and meet deadlines, this critical first step is overlooked, and a “magnetic field” isn’t created that holds the energy and centre and instead it fizzles out or falls on one or two people’s shoulders alone. If we wish to build collaboration and engagement through our process then we must practice collaboration and engagement in the design and delivery.

A core planning team needs to be reflective of the people we are seeking to engage as people trust invitation from people who are like them. Strong core teams are made up of the diversity of the system - diverse groups of people are wiser, smarter and more effective than small homogenous groups. Core teams are set up to allow us to move through multiple organizing forms - hierarchy to get things done, circle for reflection, network to share information and knowledge, and bureaucracy to bring stability.

“Every time we gather becomes a model of the future we want to create.” ~ Peter Block

If you are called to create a future where different diverse aspects of your network or group are learning and co-creating together, it doesn’t align to have a homogenous planning team. We must travel together, practicing and learning our way into that future we want to create.

Who to consider for a core planning team?

- Those holding the strategic perspective; who understand the need for the initiative and are connected to the power and resources to make it happen and give it the best chance of success.
- Those with “new voices”; they are essential for new thinking and to help see blind spots e.g.:
 - Young people (or those with a youthful perspective)
 - Newcomers (preferably those from other industries)
 - People from the geographic periphery of the organization
- Those who reflect the diversity of the system (diversity might be gender, age, ethnic, racial, economic, hierarchical, geographic, experience level, industry, etc).
- The very best core teams contain people who are willing to stretch and learn together about new ways of working.
- How many people? Approximately four to six people, and the exact number is flexible. If it is too large, it is difficult to hear all voices on planning calls. If it is too small, we might be missing some important diversity in your system.

What does a core planning team do?

Working with core teams is different from facilitating a planning committee. We are discovering the heart of a project and to develop a co-created capacity to host a project together. This is not the same as acting as a facilitator for a team. Core team work comes from the inside of the group, not the outside. They steward the change. They create the shift. They also embody the change. They become the designers, champions and leaders of the change, reflected in the way they approach the shift. They don’t simply hire a facilitator and give orders. They host. They have a stake in the outcomes, and they believe in change.

At a practical level, the core planning team is involved in the conversations to prepare for the participatory session(s)/process, and comes back together after the sessions to reflect and decide what's next (action/reflection cycles). Action in a core team is built around people taking responsibility for what they care about - not about a centralized decision maker who tells people what to do.

The core planning team, along with the sponsor and facilitator, comes together for planning meetings to determine:

- What is the need the session/process hopes to meet, what are the principles of how we want to work with and be together with the participants, who are the people coming and what is important to them, and what do we want to have in our hands (the tangibles and intangibles) as a result of the session/process.
- What date(s) and location(s) will best serve the intentions of the session.
- Review a draft design of the session. *I will make recommendations from different group processes and questions that matter a design of the session that meets the need. I don't recommend an overly pre-determined group method but listen and co-develop a design that serves the purpose of the session.*
- Creating an invitation and invitation process that will help people show up fully. *A good invitation process articulates what the clear purpose of the session is, how it will affect their work, why they should take time and attention away from their regular tasks, and what is required of them to participate well.*

Then after the session the core team meets for a post-session debriefing to reflect on the experience, plan for what follow-up and next steps/sessions might be needed, and how we do this in a way that sustains self-organization and capacity building.

About decision-making, where decisions are part of the process... the core team is responsible for preparing and hosting (with a facilitator) the participatory sessions, and then participating fully. The decision makers commit to integrate the outcomes of the engagement process (within the envelop of any non-negotiables).

Dangers of core teams

- Being elitist. Not everyone gets to be on a core team. Core teams sustain themselves and become trustworthy by reaching out beyond themselves and their obvious relationships to inform their work. Innovation nearly always comes from the margins not the mainstream.
- Action in isolation. Groups within the core team just head into the blue yonder and go and do lots of work without sharing the learning back in. It is not our difference that is dangerous in this work, it is our disconnection.
- Getting ahead of the game. Core teams go through a very steep learning curve as individuals and as leaders in their community. It is easy for them to get ahead of the game and lose touch with the very people they set out to serve in the first place. Regular contact and engagement with all those impacted/involved/interested is essential.