

~ planning in partnership

What are Design Teams?

A Design Team, a Planning Team, or a Steering Group are a representative group of the people who will attend the intervention (and by intervention we mean large, small, or series of meetings). They represent all of the grades, functions, and locations of the people who will be involved. Their role is to help plan and design a meaningful intervention.

In real life this looks like people from:

- Leadership team – who can give the leader’s perspective on this intervention and on the organisational needs.
- Middle management – often where decisions in organisations come to a head, as it’s the middle management role to implement intervention decisions.
- Junior grades – if the intervention is around implementation then the less senior staff are usually the ones doing the work!
- Cynics – they are in every organisation and if interventions are to work for the whole organisation then you need to hear their concerns as well as the ideas of the enthusiasts.
- Internal facilitators – who may be leading on this intervention.
- Logistics – someone who will look after the logistics of the intervention i.e. sending invitations, ordering stationery, liaising with the venue etc.
- Communications – someone who has responsibility for comms; and / or people who have helped in the past to organise large meetings.

The more you worry about the difficulties of the team working together the more likely you are to have a comprehensive mix! The team can be as small as five to ten people and as large as thirty. It can be harder to reach consensus with the larger team although the risk with a smaller team is that a significant voice will be missing from the discussion, which could cost downstream.

What’s their purpose?

Essentially the design/planning team are sharing responsibility with the leaders for the success of the intervention and all that this will entail.

Their purpose could be described as

“To come together as a cross-section of the organisation to share information and ensure that we set ourselves up for a successful intervention taking into account all views”

Why use them?

Simply to ensure that you maximise the time available and carry out meaningful work. Time is important in organisations and to get the best out of the time available we find that meetings where real work is progressed have much more impact.

Using and investing in a design team is important for a number of reasons:



- If the plans include pulling together a large number of people it is better to invest time in learning what will and will not work with a smaller representative group rather than risk struggling in any interventions themselves.
- The work they do will look comprehensively at the issues and scope out all of the work necessary to move things forward successfully... fast
- If they are a well-chosen microcosm, many of the system dynamics will play out as they achieve consensus and the plans will be based on a thorough understanding of what is possible and probable.
- They will build a thorough appreciation and ownership of what they want to achieve and they will continue to hold that sense of shared responsibility and ensure that changes are made as and when needed.
- The planning/design team is a significant opportunity to live out the new ways of working together and to forge new partnerships across the system. If they are not trusted and believed then the whole process is likely to meet the same reaction.

Is the Design Team process complicated?

No, not really although there are two areas to watch out for:

1. The right mix of people – not too many leaders, not too many people that can't make decisions, enough people affected by the decision, cynics of the process.
2. The work that the design team does: Don't think that the design team have carte blanche over the whole of this work – they don't. They work in partnership with the leadership team and the consultants.

What work do they do?

The basic steps in design/planning work are:

Share Data

Invest a significant amount of time developing a big picture of the diverse views within the team. This is a useful reminder that there are many differing views and needs across the organisation. The conversations sharing this data support the development of integrated thinking which will support the later consensus. The more that people feel their views have been heard and understood at this phase the more constructive they are likely to be in developing common purpose and putting the plans together. Arguments later about purpose or the plans are almost certain to indicate that data was not surfaced at this stage, which is relevant and important. The output of this phase is a clear understanding of the relevant information.

Identifying Outcomes

The design team 'imagine' leaving the intervention and identify what they want to have achieved. There is a logical flow to start with what have we achieved and then work back to the 'why'. The 'what' is more concrete and easier to get a handle on. Once people get clear about that they can move up to answer the question of, "What difference it will make?"

Build a Clear Common Purpose

Using the data they have shared the design team move to develop a clear and compelling purpose for the intervention that will speak to the needs of the organisation. This purpose not only serves as a guiding light to inspire the creative design work, it acts as a test for the



design logic and content and will support the communications (invitations) with the rest of the organisation.

Plan the Activities Needed to Achieve the Purpose (Process)

The next step is to develop the plan for the intervention as well as any other supporting activities that are seen as necessary. Design teams should be putting themselves into the shoes of participants and asking themselves - 'what would make sense for me, what information would I need, what would I want to do next'?

If the team are speculating at this stage about people who are not present and whether those people could cope etc. then that is a good clue that the design team are not representative enough and there are some views missing. 'Speaking for yourself' is a good ground-rule for activity design.

Evaluate

This should occur throughout the design team process ensuring that all views are being heard and that the process is progressing. The purpose should be checked back against the information generated at the beginning. The plans should constantly be checked to see how they achieve the purpose.

After the Design Meeting

Once the design meeting is over, the information is written up and a first draft design produced. This is tested with the design team at a subsequent meeting. The first draft often includes several options for specific pieces of work and the purpose of the second meeting is to finally decide which is the best option for the participants and the organisation.

Once the second design meeting is over, handouts for the specific tasks of the day are produced.

There are several helpful mental models for this work:

- **Inquiry** - be very, very curious (hold off on advocating as much as possible until you are sure the data is understood)
- **Boundary management** - have a clear plan and structure for the design team work and encourage them to share responsibility for self-facilitation and looking after their own needs whilst keeping focused on the task
- **A safe environment** - stop fights and help people stay in the room focused on the task by:
 - *Sticking to the structure of task and times*
 - *Encouraging and supporting differing voices to be heard and understood,*
 - *Asking for others that have opposing views*
 - *Encouraging people to ask questions and give all information rather than judging statements*
 - *Encouraging concrete examples*
 - *Focusing on the task and the common ground*
- **Authority** - the team have information and data about the content and facilitators provide information about the process as well as reframing and mirroring on the content.



Where do we start?

Here are some simple steps:

- Take a look at the organisation thinking about grades, functions, geographical locations etc.
- Decide how many people are needed to ensure a cross-section of the organisation is represented on the Design Team.
- Set a date for the two or three meetings you will have and make sure they are far enough out to give people time to attend.
- Invite people to join the Design Team, sending them a brief outline of the role of the Design Team, plus any supporting paperwork relevant to the intervention they are designing. (Make the invitation compelling - people have busy diaries make this something that they are curious and want to know more about)
- Ensure you have a good space for the meeting, plenty of natural light, good wall space for sticking up paper and flipchart and plenty of refreshments
- Design an outline plan of the design team meeting and the work people will be doing.

How much time will Design Teams need to invest?

That depends on the type and complexity of the intervention you are designing. For small meetings – up to 50 people – then we would recommend that the design team meet for 1 day followed by a further half day. For larger meetings then a minimum of 1 day followed by a further one day. Ideal timing is 2 consecutive days followed by a further day.

Do the meetings have to be face-to-face?

Not always although face-to-face is better. You can use telephone or video conferencing to bring together a disparate group. If time is very limited it is possible to do some of the data gathering before hand using a simple questionnaire. Once the responses are collated then a small number of people analyse the data and work on the design of the intervention. This draft design would be emailed to a sample representative group to test that it was on track.

Do they go wrong?

Yes and the way this manifests itself is when the intervention doesn't work as planned. When interventions don't go as expected it is often traced back to the design work – too many leaders, not enough leaders, too many different people joining the design process at different times, not enough time spent together, trying to rush the design process, not giving the Design Team ownership of the process, too much interference from other sub-committees, not enough dialogue.

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