

Organizing your EBPP Planning Team

In order for your Planning Team to be most successful in this process, there are five important roles for stakeholders to take on the EBPP Planning Team, including four leadership roles and the all-important role of Member. People joining your EBPP Planning Team may self-select for these roles, or roles may be offered to certain people based on their skills, role in the community, time available, or general fit. If possible, you may want to consider paying or providing incentives for people to participate on the EBPP planning team or to take on leadership roles if they are not compensated through their professional job, such as youth or community members, both for their time at meetings and their work in-between meetings. You may also consider hiring an outside Facilitator, who can also serve as the Convener, if you have the resources.

Member

The Member's role is to be committed to the process and to commit resources, especially their time, both in and out of the regular meetings to keep the process moving forward. The tasks asked of the members change throughout the process, but it is important for every member to support the goal of the team by committing to and completing tasks outside of attending meetings throughout the process. The Member's role includes:

- Being an active member of the EBPP team and to actively voice your opinions, thoughts, ideas and knowledge during meetings and throughout this process
- Regularly attending scheduled meetings for both the EBPP Planning Team and any work groups or subcommittees the member joins
- Taking on the responsibility of tasks that are well suited to the Member's role, skills, and access to resources and completing those tasks within the assigned timeframe whenever possible
- Arriving to each meeting on-time and prepared to participate fully by reading the agenda and any other requested materials prior to arrival.

Facilitator

The facilitator's role is to understand the EBPP process and to guide the Planning Team through the process. The Facilitator's role includes:

- Guiding the Planning Team through the EBPP process
- Creating space for all voices at the table to be fully heard during every meeting and throughout the process, especially voices that are often silenced
- Ensuring every Member is aware of and in full agreement of their roles as Members
- Maintaining a positive working relationship with every Member
- Coordinating with the Convener, the Recorder, and the Accountability Tracker to synchronize all activities
- Setting agendas for each meeting and submitting to the Convener to be distributed
- Preparing all materials and documents necessary for each meeting
- Facilitating the conversations and activities during each meeting.

Notes for the Facilitator:

As the Facilitator, it is your role to remain as neutral as possible and facilitate the group in coming to decisions without influencing the outcome. Remaining neutral and being responsible for facilitating activities makes it challenging for someone in this role to participate in the process in the same ways others in the group can participate.

Convener

The Convener's role is to ensure the logistics for each meeting are taken care of and is the primary communicator with the group. The Convener's role includes:

- Arranging meeting times and dates that work for everyone in the group (as best as possible)
- Reserving meeting venues and ensuring the venue is accessible and meets the needs of everyone in the group
- Arranging for food/beverage, translation, childcare, accommodations, or other needs to ensure everyone can fully participate in the meeting
- Sending out calendar invites, agendas, meeting notes, accountability reminders, additional materials, etc. to all attendees prior to the meeting
- Maintaining an updated list of all planning team members and current contact information

Recorder

The Recorder's role is to document the important pieces of the process for the EBPP Planning team. This role includes:

- Making meeting notes, especially in regards to decisions made at each meeting
- Managing the creation and sharing of documents and files on the platform selected by the group (DropBox, Google Drive, etc.) related to the EBPP process
- Maintaining an organized file of all EBPP documents, including agendas, meeting notes, spreadsheets, historical and current membership lists, accountability trackers, etc.

Accountability Tracker

The Accountability Tracker's role is to track who has agreed to do what by when. The Accountability Tracker's role includes:

- Maintaining up-to-date documentation of tasks to be accomplished, who has agreed to accomplish the task, and a due date for completion
- Composing Action Item reminders to be sent with meeting invitations and submitting to the Convener in a timely manner (the Convener will include these with the meeting reminders, agenda, etc. prior to each meeting)
- During each meeting, reviewing the accountability tracker and celebrating who has accomplished their tasks, reminding members of up-coming tasks, and rescheduling uncompleted tasks

Notes for the Accountability Tracker

If someone has run into a barrier when attempting to complete a task, the Accountability Tracker or the Facilitator can facilitate a conversation with the individual or for the group to help problem solve ways around the barrier or decide if the task is absolutely necessary to be completed before the group can move on.

The Accountability Tracker is NOT the accountability "enforcer". This role is NOT to embarrass, shame, punish, or otherwise call out a missed deadline or an incomplete task in a negative or punitive fashion, especially during a group meeting. If need be, the Accountability Tracker may privately reach out to a team member who is having difficulty following-through with tasks and offer to help problem solve any barriers they have run into or seek to find another team member who can take on the task. This communication should be done in a supportive and nonjudgmental manner.