Workshop Planning Template **-** to be adapted as required

A quick version if you are in a hurry – the 7 Ps

Purpose	Why do you need this workshop? What will it achieve that a meeting wouldn't?
Product	What will it produce and how useful will it be?
People	Who needs to be there and what roles will they play?
Process	What will be the process by which the people will achieve the product?
Pitfalls	What are the risks and what processes do you have to set in place to minimise them?
Preparation	What would be useful or necessary to do in advance?
Practical concerns	Logistics: rooms, invitations, supplies, lunch!

THE FULL TEMPLATE

Defining and setting objectives	What are the objectives of the workshop? (What will a workshop achieve that meetings or research would not?)
May take a number of meetings to define Expect the emergence of hidden agendas Do background research (on issues and/or people). Use your understanding of client culture to create the right style of workshop. Look in the Manual for suggestions if you have to help the client surface and define objectives. Don't be surprised if you have to come back here and refine the objectives once you have got further on. Clarify outputs – **what format? To go to whom? How detailed? The discussions or just the conclusions? What will it be used for?**	**What outputs will be needed?**
Considering key players and their roles	**Main facilitator and assistants**
1. Who will be the main facilitator? What support will they need? Make sure you and the workshop sponsor agree on your/facilitators' authority 2. Any very senior people who may wish to attend - possible effects of their presence and how this should be managed? 3. Identify useful participants – diversity of roles, experience & perspectives. Think in terms of tables of 6-8, ideally with a support facilitator per table. Decide how you will mix participants on each table and the extent you want them to be aware of each other's roles. 4. Identify key people inputs & how to brief them. **Inputs can be via video or 'guest appearances'.**	**Any v senior people and how to manage them?** **Main participants** **People who will attend to give inputs**

How to describe and 'sell' the workshop to participants	**Main reasons why participants should attend your workshop**
To manage expectations and develop a positive approach **WHY should they attend: personal/group benefits** **WHAT: interactive, engaging method for reviewing/deciding.......** **HOW: specially designed, unique opportunity etc., etc.** **You may want to characterise the workshop as a democratic process and emphasise that it will be non-hierarchical.** **LATER** **Invitation letter or pack with the sales pitch, followed by day plan and map/directions and pre-task pack.**	
Pre-workshop tasks	**Pre-workshop tasks**
To save time on the day **To create a level playing field** **To focus people on the issues** **To allow them to share a relevant experience** **Explain the importance when describing the task.**	
Timing	**Start, lunch and finish times**
How much time is realistically available and is it enough for all the objectives? **What are the best start and finish times?**	

Location	

What locations are available within budget?
What are the benefits and drawbacks of each in terms of
  o **Accessibility**
  o **Space**
  o **Physical and psychological comfort**
  o **Support / facilities**
  o **Food / catering/ diets**
  o **Relevant types of stimulation (to get people thinking/ feeling / understanding more of the issues**	

Budget	
Theme / atmosphere / venue dressing **A metaphor to theme the workshop?** **What should the overall tone be?** **Use campaign materials to dress the room** **Create a sense of occasion if required with flowers or fresh fruit** **Aim to make participants feel relaxed and special**	

Support people /facilities
 	
  o **Additional facilitators**
  o **Secretarial help**
  o **Professional note takers**
  o **Presentation equipment**
  o **Cameras and recording facilities**	

Outlining a day plan	TIME	ACTIVITY	PERSON	RATIONALE	MATERIALS REQUIRED

Start by creating a facilitators version in which you put the activity, rationale for each section, as well as process comments (how it will work) and materials.
 	
If you don't know why you are doing a section, don't do it.
 	
Aim for 2-3 slots between breaks; varying the energy, having more thinking exercises in the morning and more doing in the afternoon.
 	
Allow time for:
 	
  o **Initial 'meeting' each other and group forming**
  o **Inputting information**
  o **Discussion and gathering together of key points from all the discussions**
  o **Creating /working with visual materials (flipcharts, post its, images)**
  o **If idea generating then also evaluation**
  o **Coming to consensus**
  o **Allocating action planning**
  o **Closing the day**					

Designing a facilitation day plan

If you are thinking about a whole day, break it up with 2-3 sessions/activities before each break. This will keep them within participants' attention span. You can keep the same subject; just create different types of activities around it.

AM 1	AM 2	BREAK	AM 3	AM 4
Intros and warm up

Statement of objectives for agreement

'Icebreakers' or 'Creative Warm up' help form the group and set the tone | Framework, resources

Best time for learning, listening and discussion

Facilitator inclusive and uses techniques to avoid or deal with storming | | Mix low and medium energy activities

Good time to engage people in various tasks

Clear instructions | Time to move into new territory

Mix low and medium energy activities

Move to various 'stations' for variety |

LUNCH BREAK – at least ¾ hour

PM1	PM2	BREAK	PM3	PM4
Aim for something energising after lunch

Mix medium and high energy activities | Aim for some application or concretisation of ideas

You can use different areas of the room. | | Afternoon tea is often another low point

Mix medium and high energy activities | Completion

Summarising, action planning Structure to support commitments

Time for individual reflection Feedback Closing 'ritual' |

HINT Include an 'on arrival' slot for the facilitator at the start, to remind you what to bring and set up. Remember to include 'Ground Rules'.