

How to run a workshop



Who is this for: Programme leaders, people supporting programme design process, people guiding project processes

Level of difficulty: Moderate—requires a facilitator and preparation

Time needed: Varies—from 2 hours to 2 days

When you might want to run a workshop: Starting a project, reviewing and refreshing a project, needing to establish or refresh vision, needing to think broadly about project and impact, preparing to run visioning and backcasting [will revise and add to this]

Why it's useful: Provides some guidance for running a workshop—steps to take, things to consider, resources to use.

Other guides to also use: See collections of specific workshop runsheets and guides in the toolkit.

Why workshop?

Workshops are a popular tool for getting input and generating ideas, but they are better suited for some tasks than others. Purposes that suit workshops include:

- Generating a range of new ideas
- Getting input from a range of perspectives
- Developing common understanding of a task or issue, or surfacing differences in understanding
- Introducing and trying a different way of thinking about a topic.

Workshops are less useful for tasks that require a lot of details, whether looking up external information or literature or developing specific research activities. These may be better performed by individuals or small groups. Additionally, problem solving type activities may not work effectively with multiple disciplines unless people first develop a shared understanding of the problem and how different disciplines may approach it.



Preparation

Clarify audience and purpose of workshop:

- Who is the workshop for?
- What outcomes and outputs do you want from the workshop – e.g. are you wanting to get everyone on the same page, develop a research plan, define your problem, generate creative solutions, or something else?
- What experience do you want the workshop participants to have? Do you want them to have fun, build connections with other participants, come away inspired?

Select questions, approaches, or a pre-prepared workshop plan that will fit your purposes [link to a page/ location with some options].

- These will need to be adapted to fit your timeframe, format (in-person or online), and attendees. It is a good idea to prepare a runsheet for the workshop that indicates the activities/questions to use, who is responsible for what, and how transitions between activities will be handled.
- As part of this, ensure you prepare an activity to collect feedback on the workshop, such as a feedback form, Mentimeter poll (<https://www.mentimeter.com/>), or reflection questions. It is best to do this at the end of the workshop, as response rates are low for post-workshop feedback.

Work through logistics:

- Send out an invitation and follow up
- Book a room and catering OR decide on software to use
- Identify resources needed for the workshop, e.g. large sheets of paper and marker pens for in-person or PowerPoint templates for online activities
- Identify who is responsible for what on the day. It may help to think about who will:
 - Set up the room
 - Put out any catering
 - Facilitate the sessions
 - Facilitate/ support smaller group discussion
 - Record notes on post-its or a whiteboard (can be the facilitator, but it can be helpful to have a separate person to do this, especially if there is a larger group)
 - Make additional notes on discussions

Make a back up plan if it needs to be virtual. You'll need to think about:

- What software you will use (e.g. Microsoft Teams, Zoom)
- If smaller groups are needed. It's hard to have good discussion online with a group of more than about 6, so larger groups will need break out meetings or groups to join. Check the functionality of your potential software and decide on a method that you feel comfortable with.
- If your smaller groups need facilitators/ discussion leaders. Your small groups may be happy to self-organise and work together to discuss a topic, but it can be helpful to designate a person in each group to guide discussion and ensure that everyone gets to contribute.
- What content you will work through. Activities will often need to be simplified for online use. Ensure that questions are clear, there is some kind of template or document for collecting ideas (ideally shared with the group during discussion), and there is a process for sharing ideas (e.g. one person designated as scribe for the discussion or all participants adding to the shared document simultaneously).



On the day

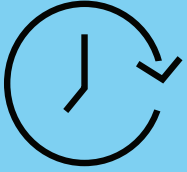
Set up

- Bring needed resources, including copies of the runsheet for all involving in facilitating and organising the workshop.
- If this is an in-person workshop, you may need to allow time for:
 - Organising chairs and tables into a good set up for your activities. (If you are meeting at a conference venue, venue staff may ask you about layout beforehand and prepare this for you.)
 - Setting up materials – e.g. putting out post-it notes or marker pens, sticking up templates or a sticky wall.
 - Setting out water and making space for any catering/ morning tea
- If this is an online workshop, it is best to join the meeting early so you have some time to collect your thoughts, double check the technology, and deal with any issues that arise. Letting participants know that you will start the call early and will be starting the meeting formally at the designated start time may also help things run more to time.

Run the workshop

Follow your runsheet, but make adaptations to the plan as needed. (For instance, an important discussion may take longer than anticipated, so a later activity may need to be shortened or omitted).

If you are both facilitating and note taking, and finding hard to keep up with taking notes, involve your workshop participants in this by getting them to write things on post-its themselves or selecting a scribe from the group.



After the workshop

Process and share workshop outputs

- Type up/ tidy up and group thoughts from the workshop and prepare a summary of key points from the workshop and any actions arising
- Share outputs with participants

Reflect on the workshop with the organising team

- Consider how the workshop went and if the desired content was obtained
- Identify actions/ improvements for future workshops
- Identify any further work needed to follow up on points raised by the workshop

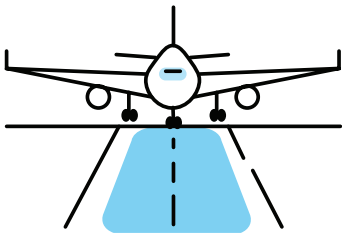
Complete follow up work.

This may include completing tasks identified in the workshop, broadening or deepening understandings of topics covered in the workshop, and identifying if further workshops are needed.



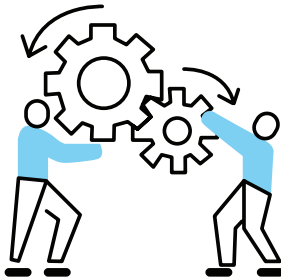
Important considerations

Lead-in time



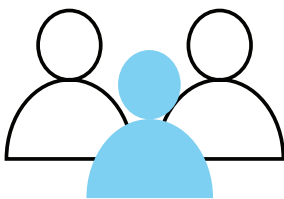
Workshops, especially larger workshops with participants from multiple organisations or in high-level roles, may take a long time to organise. (Long run-way!) It may be helpful to start organising these larger workshops several months in advance.

Facilitation



Most workshop processes need one or more people to guide the process, keep people to time, and help organise ideas.

Group set up



If working with a small group (less than 10), the group can do activities and have discussions together. However, larger groups will need to divide into smaller groups for discussion. These smaller groups may be able to self-organise, but it will be helpful to have facilitators circulating or with the groups to support their discussion.