A Generic workshop plan

This section covers generic workshop planning that you can use for both Toolkit use options 1 and 2. It covers the steps you should take in planning your workshop, who should do what, a check list for beginning your workshop and tips for ending the workshop.

Before the workshop

By following the following steps you will ensure that your workshop is a relevant and valuable experience for everyone.

Step 1: Define the goals

Many workshops end up being a waste of time because there's no clear goal kept at the centre of the discussion. Without a clear goal there is really no point in getting people together.

Every workshop must have a goal, or a question to be answered. For example:

> 1. How can we make our PMHC development more focussed on the needs of child and youth?

Step 2: Decide who and how many should attend

Who attends should relate directly to your objective. For example if your workshop goal is to focus on the needs of child and youth then you probably want relevant health care and other professionals in that field such as a GP with a special interest , child and adolescent psychiatric team members - in

this instance you might include professionals from education, CYFS, justice and the police. If in your area there is already a service with an overlapping role, in this case, perhaps a 'Youth One-Stop-Shop', they should probably also be represented.

Do you want a larger group which can divide into smaller groups for discussion, or do you want a focussed detailed solution to a problem in which case you probably want ten or fewer people. Make a list of who needs to be at the workshop. It is a good idea to leave a few places open for last minute additions.

Step 3: Where to hold the workshop

The number of participants will give you an indication of whether you need a small conference room down the hallway or whether you need to find an outside location that's large enough. It is a good idea to think about the logistics and practical details of your workshop and then choose your location. What visual aids do you need? Do you need teleconferencing equipment? Will everyone be able to reach the location? What catering facilities do you need? Is there a usage fee for the space? What is the seating arrangement and how formal or informal do you want it to be? Go and see the space before deciding if it will meet your needs. For example, horseshoe seating arrangements give a focus and are inclusive, but imply that there will be something happening in the open area such as a PowerPoint presentation, and that the 'leader' will direct proceedings close to that area. Make sure that the lighting is adequate and that there are clear sight lines, especially if the workshop will be using audio/visual equipment.

Step 4: Determine the dates

The next task is to select the date(s) and times for the workshop. When selecting a date be careful not to conflict with holidays, or pre-existing events. Check with key people, especially if you plan to draw participants from a wide area.

Step 5: Create your agenda

Once you have decided on your main objective and you know who will attend, you can develop an outline of how you will achieve the workshop's goal. Create a list of the three or four main points to discuss and resolve and then break each point down into further details. Your biggest problem will not be finding enough to talk about, but limiting what you will cover. Breaking your main points down will give you an idea of the scope that is possible. The more detailed your plan the more it will ensure that your workshop runs to schedule and be successful.

Step 6: Publicise the workshop

Make sure the workshop information is easily accessible and understandable. You could develop a flyer for notice boards or email circulation: include this in an organisation newsletter or bulletin board. The type of advertising will vary depending on the workshop and the participants that you want to attend. The flyer should include date, time, title and description of workshop, facilitator's name (if applicable), location including room number or address, and contact information if someone has questions.

Step 7: Feedback

It is important to have a plan to communicate decisions that were reached during the workshop. This may be a mass email to everyone with the details, or something posted to the intranet. People need to know that their hard work actually resulted in a decision or action, so keep them informed about what is happening after the workshop has ended. Without this step it is easy for busy people to become cynical about the point of workshops.

Roles: who does what?

There are different roles that are critical in the planning and leading of all workshops. These should be clearly decided in the workshop planning stage. Someone may even have to do parts or all of each role sometimes taking off one hat to reveal another.

Workshop leader / Facilitator

- ❑ Contributes to collection of resources prior to and following the workshop
- ❑ Prepares in advance for workshop discussions via readings, writing or discussion.
- ❑ Participates fully in the entire workshop
- ❑ Leads activities during, and action or implementation following the workshop.

Workshop convenor / Administrator

- ❑ Assists with the development of the workshop plan and the list of participants
- ❑ Books facilities, arranges any audiovisual equipment, arranges catering
- ❑ Promotes the workshops

❑   Answers questions about the upcoming workshop

❑   Collaborates with the workshop leader on dissemination of any preparation material for the workshop and of the results, decisions and actions resulting from the workshop

Participants

Nothing is deadlier or less effective than a workshop where participants do not participate. Everyone attending the workshop needs to be given opportunity to participate actively whether it is through small or large group discussion, short problem-solving tasks or scheduled thinking and writing time. Participants also bring valuable experiences and expertise which must be an integral part of the workshop. That is part of the point of bringing people together. Allowing time to interact and share experience and knowledge can support the development of networks that will last beyond the workshop. Participants can/should:

❑   Contribute to any collection of resources prior to the workshop

❑   Prepare in advance if there is any readings or material disseminated to attendees before the workshop

❑   Participate fully in the entire workshop.

Appropriate deadlines and timetable need to be set for participant input into the programme.

Workshop presenter/facilitator

The workshop leader may also be the facilitator or may decide to bring in a workshop facilitator from an external institution or discipline. The facilitator does not need to come from outside the organisation or team, but they must be able to take a neutral stance and be objective. The facilitator is able to step back from the detailed content and from his or her own personal views and focus purely on the process of managing the discussion. The facilitator's role is to ensure productive group processes, whether this is brainstorming a new idea to improve the availability of interpreters, discussing the development of a process to better liaise with

secondary mental health service, or deciding how to limit demand for an over-subscribed psychological treatments service. The facilitator's role is to lead, question, define, challenge and navigate the group to solutions that are better than the sum of what the individuals would arrive at alone. The workshop experience and product is enriched by the contribution of multiple viewpoints and approaches, and the facilitator ensures these are heard. The facilitator should be a good time manager.

Checklist for beginning the workshop

The following checklist provides you with a list of pointers for beginning any workshop.[1] The opening of any meeting or workshop sets the tone for the entire gathering.

- ❑ Housekeeping: Tell people the location of toilets, emergency exits and other relevant safety and comfort information.

- ❑ Make introductions: Introductions are a good way for people to begin to get their voices in the room. Spending time on introductions can pay off. It can help set group norms for people speaking up or sharing responsibility for the success of the session; and for taking at least a small risk in revealing something of themselves such as their name, job/role, and any concerns or aspirations for this workshop. For fun you can ask people to reveal something important about themselves that others may not know.

- ❑ Check and clarify expectations: This is the time to check and clarify expectations with everyone present. This not only allows the session content to be adapted if necessary but also allows participants to make an informed choice about whether and how to align their goals for the session with those of others.

- ❑ Agree on the agenda for the workshop and the time allocation including breaks and any absences: Find out if anyone needs to leave early or have taxis booked. Arrange this at the start as there is nothing more disruptive to

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[1] Schwarz, R., et al., *The Skilled Facilitator Fieldbook*. 2005, San Francisco: Jossey-Bass.

a workshop than people needing a taxi booked at the crucial 45 minute point before the end when the important decisions should be made.

❑   Agree on the process, including ground rules and/or guidelines:

Example of a ground rule: confidentiality

If you want to encourage people to share their experiences and wisdom through specific examples and stories from which others can learn, then the appropriate level of confidentiality needs to be agreed upon. When people have been allowed or sent to attend a planning or policy workshop, it is usually reasonable to expect that they may be asked to report back. Where this is the case, one way of ensuring a safe environment for honest discussion is to use the Chatham House Rule. This rule states that participants may not reveal the identity or affiliation of other participants. People may use the information that is shared but cannot reveal the identity and affiliation of who contributed it.

Example of a ground rule: being respectful

Participants will have differing social and professional status, either actual or perceived. Since everyone has been invited so they may contribute it is important that this can actually occur. Power and status can inhibit this, especially if people are inadvertently disrespectful. Not interrupting other speakers, not hogging the floor, and critiquing ideas rather than people are all ways of being respectful, and it can be useful to write these rules, and others participants may suggest, on the board somewhere so they can be seen throughout the workshop.

Examples of guidelines:

Listen to understand and avoid interrupting.

Remain curious and open to the perspective of others.

Share the reasons behind your own questions and statements. The reason for this last guideline is because one of the things that people do naturally is try to understand what motivates a person to say certain things. Therefore, in order to reduce the likelihood of someone making up a story in their own minds, it is

helpful to share the reasons behind your own statements, questions and comments.

❑ Define roles including leadership: Effective groups clarify the roles of their members including leadership. This also means defining the relationship between the leaders and other group members regarding how the group handles its processes, structures and functions. This should be clarified by the leader or facilitator.

Ending the workshop

At the end of the workshop you should:

❑   Repeat your initial goals for the workshop.

❑   Review the decisions that have been made and the plans for action.

❑   Do a self-critique of what went well in the workshop and what didn't go so well.

❑   Schedule the next meeting and agenda.

❑   Thank the participants for attending, recognising the opportunity costs in people's busy schedules.

If you choose to follow option 1 then think about this:

Which problem(s) have you identified to work on in your 'business as usual' way?