



Briefing workshop: How to create an initial strategic plan

One of the first steps for the promoting group is to define a preliminary strategic plan for the Shape Up project.

A useful technique to achieve this is to resort to a briefing workshop. Briefing workshops are simple and easy to organise in working sessions.

Simultaneously, they can:

- Introduce people to the project;
- Help establish the key issues;
- Get people involved and motivated;
- Identify useful talent and experience;
- Identify the next steps needed.

They are useful at the start of a project or action planning event and can act as a public launch. Potential users of the project are invited to attend a workshop, usually lasting around one-and-a-half hours:

- The workshop is facilitated by one or more individuals (LF, LC) who will have planned a format to suit the context;
- A record is kept of those who attend, the points made and key issues identified;
- People's contributions are unattributable unless agreed otherwise;
- If people find it hard to get started, suggest writing down the first thing that comes into their heads, however big or small;
- The record should ideally include typing up all Post-it notes and flip-chart sheets, as well as key points from all debates;
- Follow up by circulating a summary to all participants.

Briefing workshop format

This sample covers most contexts

1. Introduction

The purpose of the event is explained by the facilitator. Those present introduce themselves and briefly explain their interest. Note-taker and flip-chart identified (15 min).

2. Individual brainstorming session

Everyone is given Post-it notes or cards of three different colours and asked to write down their responses, in relation to any given topic, to three questions:

- What is your dream?
- How can it happen?
- What is wrong?

Each Post-it note should contain only one response. A limit can be set for the number of responses per person to make the total manageable. Symbols can be used if people are illiterate (15 min.).

3. Categorising

People divide into three sub-groups. Each sub-group categorises Post-its of one colour by arranging them on large sheets of paper and making headings. Graphs can be added if helpful (20 min.).

4. Presenting

Each sub-group explains its findings to the whole group (20 min).

5. Discussion

Discussion about the results and next stage in the process. Strategy recommendations and immediate action are identified (20 min).

If the workshop is part of a larger action planning event, a report back will then be made to a plenary session.

Running time: 1.5 hours.

Ideal numbers: 9-24. With larger numbers, split up into more sub-groups for categorising or have a facilitating team doing the categorising (see below).

Facilitated categorising

A team of facilitators (who may be volunteers) read out responses one by one and place them in categories on wall sheets. An alternative to the procedure outlined can be useful when there are large numbers.

Briefing workshop props

- Attendance sheets;
- Banners with workshop title;
- Display material, e.g. maps, photos, plans, D Flip-chart (or paper on wall);
- Felt-tip markers (or chalk);
- Pens or pencils;
- Post-it notes (or small pieces of paper or card) in three colours;
- Tape (or drawing pins or Blu-tack).