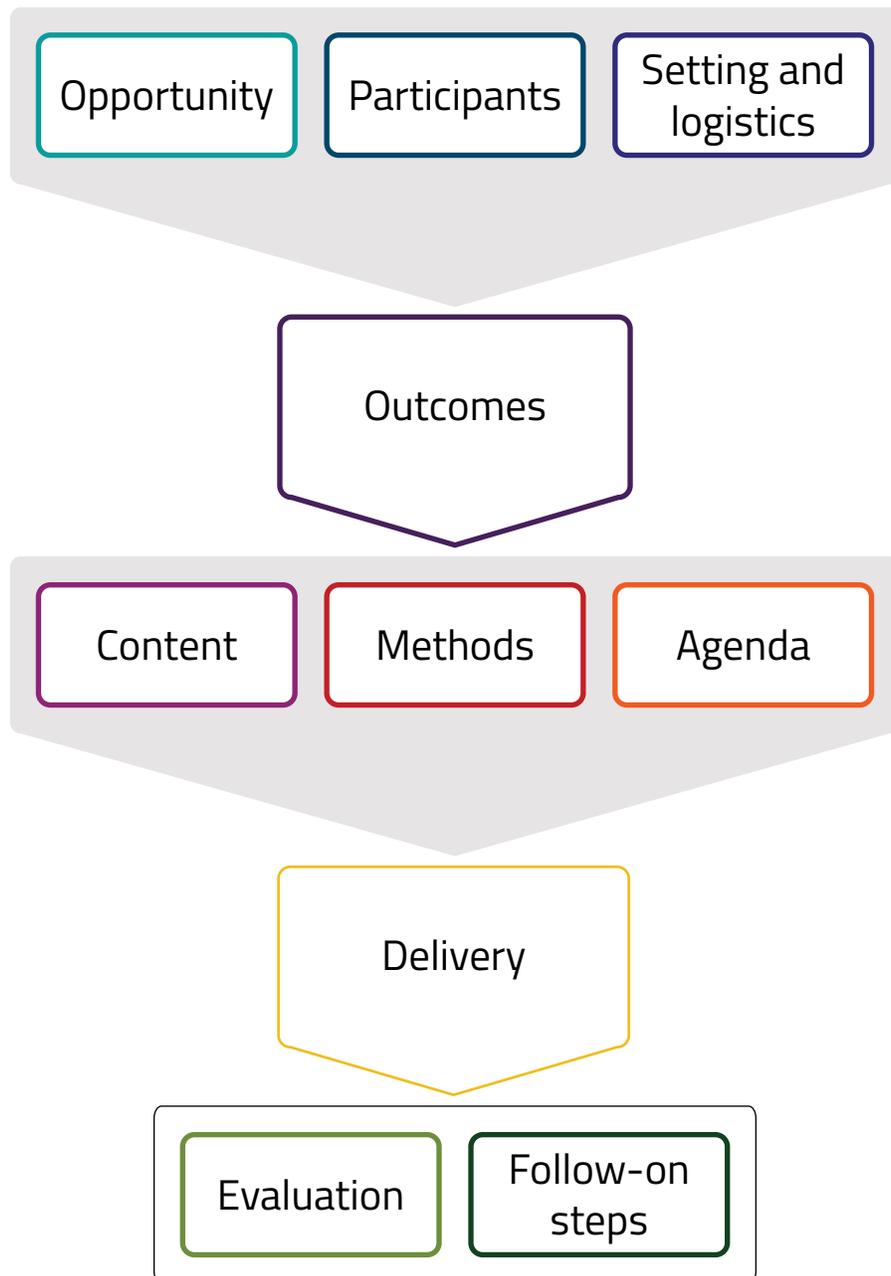


Using the Guide

Worksheet for designing an interactive workshop

This worksheet is intended to enable you to take advantage of each of the sections of [the Design Guide](#). The questions outlined in each section of the Basics of Training Design serve as a checklist. Refer to them as you complete the worksheet. In many cases, you will need to get input from the client, i.e. the organization or person that is requesting the training, before you can begin to design.



✔ Meet with the client to gather key information.

Be sure to address opportunity, participants, and setting and logistics.

✔ Given what you learned from the client, develop a preliminary design with the purpose and a set of outcomes.

Use the proficiencies to help you think about what you want the workshop participants to learn.

See *Proficiencies, Design Guide* page 47

- ✓ Draft a preliminary workshop description that can be used to promote the workshop and send it to your client for their feedback.

- ✓ Further develop your workshop design by developing the content that is appropriate for your participants and relevant to the intended workshop outcomes.

Refer to Section IV, *Transdisciplinary Research: Key concepts in theory and practice*, to identify the most important content you wish to include in the workshop. Is there an opportunity for a field trip? Do you want to invite someone to share a case study?

See *Concepts & Practices*,
Design Guide
page 61

✔ Use Section V to select appropriate interactive tools.

Note: In the [online Tools library](#), you can sort by each header as well as search by keyword. To view all of the descriptors for each activity, click on the “+” sign. You will want to use the proficiencies outlined in section III (*Proficiencies*, page 58) in addition to the shorthand listing in the Tools table (level and “know/do/be” identifier).

Methods

See *Tools*,
Design Guide
page 103

✔ Structure the flow of the workshop by building an agenda with the timing.

Follow the guidelines on timing from the activity descriptions so you know that you have enough time. If you have less time than the selected activities call for, consider dropping an activity; or else modify it in ways that people do not feel rushed. Attend to the relationship-building between you and the participants by including how you will begin and end the workshop. Build in buffers and breaks to give both you as the facilitator and your participants enough space to absorb the contents and catch a breath between activities.

Agenda

Time	Content/Activity	Comments

✔ Insure excellent facilitation.

Delivery

- Meet with the client to go over the materials and support they will provide (e.g., internet access, parking passes, meals) and the room layout.
- Create any slides you will use. Have print outs as a backup.
- Re-read any tool descriptions you've selected. Add instructions and notes for yourself to your agenda so that you have everything in one place. If you are new to facilitating an activity, it is wise to practice it with a friendly audience prior to the actual training event.

Materials:

✔ Prepare an evaluation or work with the client to develop a feedback form.

Evaluation

Ensure it is ready to go right at the end or immediately after the training event.

✔ Debrief the training event.

Evaluation

After the workshop, make time to debrief with the client. It is likely you will want to schedule the debriefing not immediately after the training, but at another time. While it is still fresh, make your own notes on what went well, what you'd like to improve, and any questions you have.

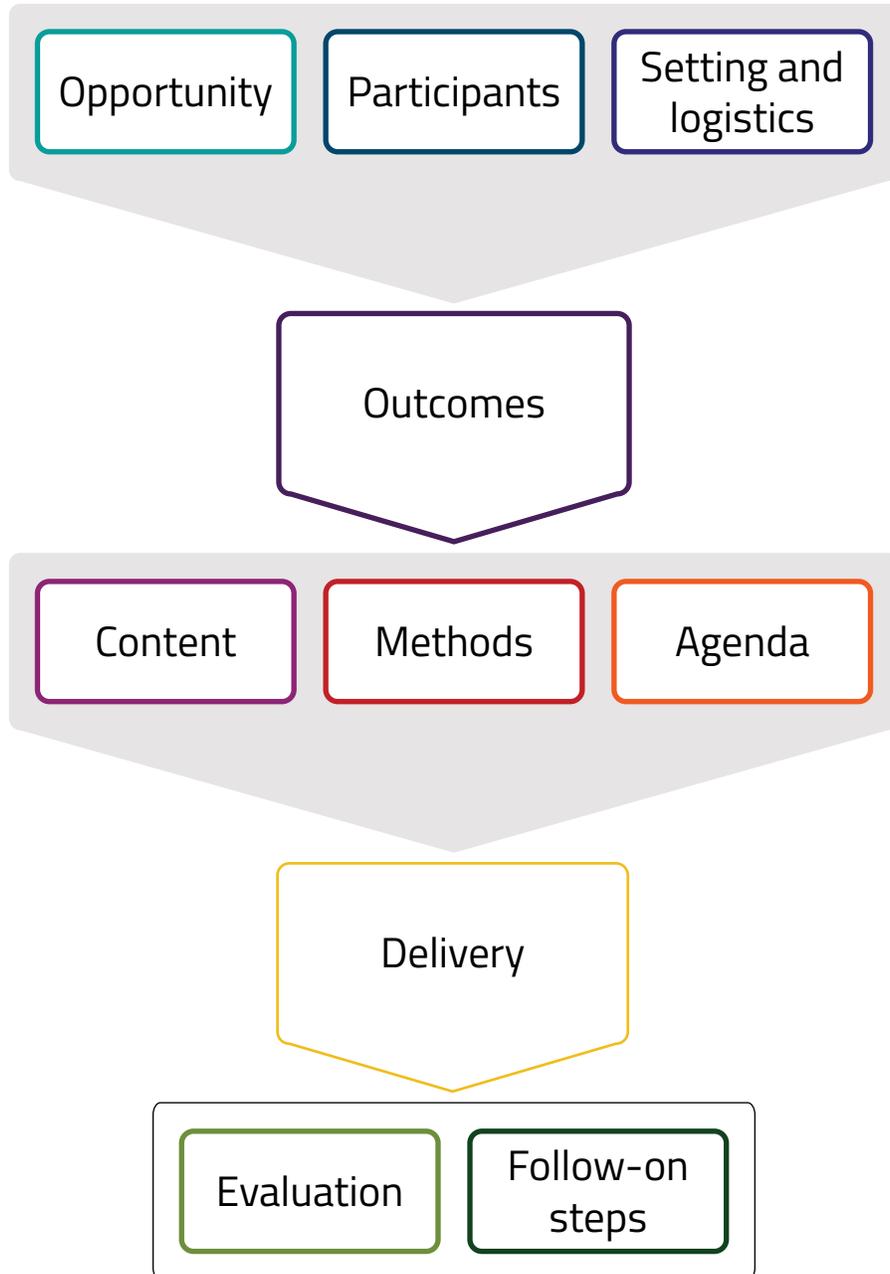
✔ Make sure you follow up on any promises you made to the participants or the client.

Follow-on Steps

Sample Worksheet Design

Client: A research institute where different languages are spoken routinely

Facilitator: Margaret



✔ Meet with the client to gather key information.

Opportunity:

The organization would like to increase the collaboration between research groups, staff, and administration. The client will advertise the workshop as a workshop on: Designing and Facilitating Collaborative Teams.

Participants:

The workshop will be open to researchers (senior scientists and postdocs), research administration, program administration, and communications staff. The Institute staff all speak the same language, are somewhat hesitant about speaking English even though they understand it and know one another. The postdocs come from many countries, know one another, and speak English to one another and to the senior scientists. We agreed that when we group people, we will consider the language differences.

Participants will be sent a survey with a list of facilitation topics in advance to get input on what they would like to focus on in the workshop.

Setting and Timing:

The workshop will be in the research institute building and will be a half-day.

✔ Given what you learned from the client, develop a preliminary design with the purpose and a set of outcomes.

Outcomes:

Since collaboration is the workshop topic, I focused on one set of proficiencies in the Intermediate level: Be an informed and enabled participant.

Be: Foster and develop an identify and accompanying values of a TD researcher.

Trainees are:

- prepared for and comfortable sharing their personal experiences, perspectives, value, and beliefs.
- take responsibility for participating with openness, authenticity, and empathy
- can reflect effectively on their own learning and the learning of the group, with guidance and humility.

✓ Draft a preliminary workshop description that can be used to promote the workshop and send it to your client for their feedback.

I sent my client a set of skills for facilitation so that she could survey the participants, and we would learn more about our audience and their interests.

- facilitative listening
- developing the art of asking questions
- creating a working agreement
- ideating: opening up possibilities (diverging)
- developing a shared vision (converging)
- thinking together: creating a theory of change

✓ Further develop your workshop design by developing the content that is appropriate for your participants and relevant to the intended workshop outcomes.

The survey results gave me a clear idea of their interests: Listening and asking questions would be one segment and diverging and converging would be the other segment. I also knew that I wanted the workshop to be highly interactive, giving everyone an opportunity to share their experiences.

✓ Use Section V to select appropriate interactive tools.

I selected [Reflective Listening](#) since it allows each person to tell a story, to explore an idea that they are thinking about, or to brag about something they are proud of. I will co-design the exact prompt with my client but as a method it will give the participants the experience of listening for facts, feelings, and values.

I will then add on a short module on asking questions since the participants can then develop questions based on what they just heard in the listening section.

In addition I will use two activities from the [Creative Problem-Solving toolkit](#) so that the participants get an understanding of how to ideate (diverge) and then select (converge). The focus will be on [How Might We](#) build more collaboration here at our institute.

✔ Structure the flow of the workshop by building an agenda with the timing.

Since the participants work on different projects and have different types of jobs, I want to start by building the group: introductions, creating a safe space for exchange, and providing a clear overview of the afternoon. Here is the workshop agenda with the timing.

Time	Activity and instructions	Comments
1:30	Introduction of Margaret from workshop organizer Quick overview of agenda for the day and logistics. <ul style="list-style-type: none"> Explore concepts of diverging and converging Provide time to reflect on "learn by doing" Offer tools you might use 	English
1:40	Opening/Warm-up for purpose of group building (Visual Explorer cards) Select a picture that represents <i>collaboration</i>	English
1:55	Think/Pair/Share – 1-2-4-All Outcomes/agreements Jot down two or three thoughts to this question: <i>I appreciate.....when I am learning and collaborating with others.</i>	Report back in English
2:10	Reflective Listening and Storytelling (Groups of 4) <i>We need a topic that everyone will feel comfortable talking about for 4 minutes.</i>	Grouping by language
3:00	Break	
3:15	Asking questions: Brief overview	English
3:25	Return to reflective listening groups and practice	Grouping by language
3:45	How Might We: Need a specific challenge* to focus on	
4:00	Grouping post-it notes	
4:15	4 "I"s	
4:30	Debriefing and addressing questions about workshop design and facilitation	
5:00	Closing	

*I worked with the client to identify a challenge that met these requirements:

- No one in the group was an expert nor was anyone totally unfamiliar with topic
- Multi-faceted, complex, may have level of uncertainty with multiple perspectives, and interesting to participants

✓ Insure excellent facilitation.

Delivery

Materials:

Revisit the logistics (setting and materials) by reviewing what you will need with the client:

- Easel and flip chart or whiteboard
- Post-it notes and "sharpies":
- Printed copies of slides
- Wall where we can put up post-it notes

Prepare a detailed agenda for yourself with instructions and notes of what you will say to introduce activities and concepts.

Practice giving the instructions, especially if the activity is new to you.

✓ Prepare an evaluation or work with the client to develop a feedback form.

Evaluation

Here are the recommendations I made to the client:

- List the various tools that were modeled with a 4-point scale: Already Use / Yes, I will use / No, I won't use / Don't know now
- Add open-ended comment area after each question.
- Ask whether the dual language worked and how it might be improved.

✓ Debrief the training event.

Evaluation

Since the group focused on a specific set of ideas to improve collaboration, we spoke about how to follow up. Several of the participants volunteered to work to implement the ideas. The client recognized that it was important for them to take on a leadership role to insure that the volunteers got support from the administration and beyond.

✓ Make sure you follow up on any promises you made to the participants or the client.

Follow-on Steps

During the workshop several participants asked me to send them instructions on how to facilitate various activities. After the workshop I send them a follow-up, listing various websites and books on facilitating.

I also let them know I was available by phone or email if they had questions.