

Planning a Facilitated Session – Step 1 – Scoping Meeting

Objectives for the Scoping Meeting

1. Discuss the vision and objectives for session/workshop/meeting
2. Discuss logistics (timing, participants, venue, etc.)
3. Identify next steps for the planning + delivery

Items to Cover

Agenda Specific

1. Purpose - What will we have achieved at the end of our day - what will make it a success?
2. Product – Specifics for the report – level of detail, etc.
3. Problems - What pitfalls can we anticipate? Issues between participants? Historic approaches that could hold us back?

Meeting Design

4. Pre-reading/work - Pre-surveys timing and scope? Any documents to review, questions you'd like the group to consider before they arrive?
5. Process - Do you have any specific discussion methods that you would like to use? Anything that you want to avoid/hasn't work in the past?

People

6. People – Who? How many? Roles & years with the organization? How are they feeling about the discussion? Level of interest/engagement in the topic? Any special needs (e.g. people with a visual impairment, people in a wheelchair, dietary requirements, etc.)
7. Protocol - Anyone beyond your team attending? Specific protocol issues/requirements?

Logistics

8. Parameters - Start and End time? What meals + snacks are provided?
9. Place - Where is the meeting? Room specifics (e.g. pillars, tables, lectern, AV, etc.)

Next Steps

- a) Step 2 – Develop the Pre-meeting Survey
- b) Step 3 - Develop the draft Agenda and meeting design - Manal
- c) Step 4 – Create meeting materials – Sayid Consulting (e.g. slides, worksheets, flip charts, etc.)
- d) Book venue and catering – Who? When?
- e) Communicate with participants – dates/times, travel, dietary needs, etc. – who + when
- f) Other next steps

