

Strategic Workshops: Planning and Design

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(NNEWH)

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Foreward

The following report was commissioned by the Working Group on Women and the New Genetics (WGWNG), an adjunct group of the National Network on Environments and Women's Health (NNEWH) and the Centres of Excellence in Women's Health Program.

The intent of this report is to present models, case studies, resources and general information for the design and implementation of an effective strategic workshop. This report does not address the general planning of conferences, but rather focuses on factors that differentiate a strategic workshop from a conference format. Specifically, the report is intended to inform the preparation of a proposed strategic workshop of the WGWNG, with special relevancy given to address the community/academic consultative process as well as the broadly defined goals of the WGWNG. However, the contents of this report speak to the planning and design of strategic workshops generally, and are applicable to initiatives outside of the WGWNG's mandate.

The report contents are derived primarily from telephone interviews with the primary organisers of four conferences in the field of New Genetics and Genetic and Reproductive Technologies, namely:

- "NRTs... The Contradictions of Choice: The Common Ground Between Disability Rights and Feminist Analysis", held in Vancouver in November, 1994.
- "Disability Rights in Dialogue with Clinical Genetics", held in the U.S. in May 1996.
- "Genetic Information: Acquisition, Access and Control (WAGICS)", held in the U.S. in May, 1996.
- "National Dialogue on Genetics", held in the U.S. in March, 1998.

These conferences were chosen as a resource because of their emphasis on a feminist and women-centred forum for approaching the issue of New Genetics. Representation at the conferences was generally cross-sectoral, with a strong emphasis on community group participation. Organisers made special efforts to include (or to attempt to include) women of colour and women with disabilities. Each of these factors is of relevance to the goals/objectives of the WGWNG's proposed strategic workshop. In addition to conference materials provided by the organisers, other resources drawn on are listed in the bibliography at the end of the text.

The contents of this report are broadly divided into three sections. The first section, titled "Workshop Preparation," presents some questions that organisers need to work with, in order to establish the parameters of the workshop. Suggestions for the composition of the organisational team, participant lists, and preparatory communication/materials are made. Section two, "Workshop Structure" discusses the role of facilitators/mediators and identifies informal and formal models for interactive group work. The third section, "Follow-up/Continuity of Networking" discusses options for maintaining communications between workshop participants. The summary presents suggestions made by informants and also contextualises workshop objectives by outlining a framework of how strategy, generally, is formulated for responding to identified issues.

I. WORKSHOP PREPARATION

A suggested optimal length for a strategic workshop, especially for an initial problem identification, is two to three days. Where multi-sectoral and varied social/economic status groups are to be included, it has also been suggested that several, rather than one, workshop be organised, each tailored to a specific target group of participants, in order to ease communication difficulties and provide for a better focus for each individual workshop. Much of the contents of this report are adaptable to a multi-workshop scheme.

1. What's involved? - Objectives and Goal Setting

Foremost, determine what objectives of workshop are, relative to longer-term goals, and maintain a clear focus throughout. Consider both process and outcome. For example,

- What specific outcomes of the strategic workshop are needed in order to meet the proposed goals of communications/networking, research, education and policy impact?
- Is consensus sought or needed in order to proceed? How important is the formulation of recommendations and action plans?

The workshop must be operating from a platform that is clearly defined before participants sit down around the table. As one informant stated, "dump the rhetoric" and disclose the intent

- How does the group consultative process relate to desired outcome? Are process and outcome objectives consistent? Note that for community-academic consultation, a fair (i.e. "equal") consultative process should be a central objective.
- How much and what kind of conflict is constructive? When will it interfere with objectives? Identify and disclose potential conflict in order to facilitate clear lines of communication.

- When setting an agenda, frame some specific questions that will become the focal point of the workshop.

Clear objectives will help to determine participant list as well as other audiences. When inviting participants, be sure they are aware of and agree to work with the workshop objectives. The workshop must be operating from a platform that is clearly defined *before* participants sit down around the table. As one informant stated, “dump the rhetoric” and disclose intent.

Resources

Be sure of financial resources before concretising plans. Do not be over-ambitious. Overextending your capacity will lead to frustration for all involved and will not be conducive to further networking/communication nor to meeting defined objectives. It is better to stay small and focused than to attempt to work outside of your means.

3. Organisational Team

In addition to a planning committee that oversees the work and makes key decisions, the following individual positions are recommended:

- Planning Committee Chair to act as liaison between planning committee, assistant(s) and co-ordinator; to provide introductory remarks/welcome at workshop
- Workshop co-ordinator (may also be workshop chair) to oversee and participate in planning. This is potentially a very time-consuming position and may amount to as much as 20hours/week as workshop date approaches.
- Administrative/communications assistant to aid co-ordinator for duration of planning and after workshop date (to edit report and follow-up documents, facilitate networking, etc.). A minimum of 10 hrs/week, preferably more, would be recommended. As workshop date approaches, hours would likely increase. Responsibilities of co-ordinator and assistant overlap.

A facilitator with an academic affiliation might best be avoided. She should be experienced in working with mixed, and especially community, groups in order to balance the strong academic presence in workshop planning.

- Neutral third-party facilitator/mediator should be involved (even minimally) before the workshop date. Suggestion: a facilitator with an academic affiliation might best be avoided. She should be experienced in working with mixed, and especially community, groups in order to balance what is generally a strong academic presence in workshop planning. Refer to Section II: “Workshop Structure” below for a more detailed description of facilitator role.
- Other: logistic support for duration of workshop for participant registration, note-taking if deemed necessary, photocopying and reproduction of needed materials, relay of communication, and for various errands that arise throughout the day.

Workshop organisers speak frequently of “burn-out”, long hours and high stress as the workshop/conference date approaches. Conference organising tends to overload individuals who already work full-time doing other activities and many of whom are volunteering time. Be sensitive to these stresses and pressures when assessing human resources needs. Likewise, be sure individuals are committed for the duration. Changing team members, especially the co-ordinator, assistant and facilitator/mediator part way through is disruptive and contributes to the loss of both time and focus. Here again, being sensitive to the pressures and time commitments involved on the part of the organising staff can help to avoid these disruptions.

4. Participant List

Emphasis again is on clarity/focus. Choose participants based on expressed objectives of workshop. Be inclusive, however acknowledge that the line has to be drawn somewhere, and that you can not let people in just because they want to be there. It is acceptable to make these choices and exclusions, however

criteria must be clearly outlined and the process must be transparent. Some considerations:

- What kind of contribution do you want participants to make? Here, the question is not just “who they are” but “how they are” in group negotiation. Avoid inviting angry factions and maintain a focused agenda so that the most difficult voices do not “hijack” the proceedings. If participants are not prepared to work within the workshop objectives and framework, then there is little point in having them present. Workshop activity needs to be constructive, not destructive. This does not mean that the participants must agree on the issues, only that they need to agree to work toward objectives of workshop and communicate with the group, which means accommodating other participants’ differences.

• Frame the terms of reference for participants by specifying in prep materials the importance of each individual’s contribution to and responsibility for facilitating the learning/negotiation process. This is a component of outlining workshop objectives.

- Role of group participants: their individual attitudes and methods of participation affect group dynamics; their willingness to deal with (inevitable) tension and disagreement without becoming disillusioned or angry is important. Frame the terms of reference for participants by specifying in prep materials the importance of each individual’s contribution to and responsibility for facilitating the learning/negotiation process. This is a component of outlining workshop objectives.
- Be aware of who knows who and how this will affect group interaction. Camaraderie and already-established networks/ties can leave other participants feeling left out. Provide for a balance. For example, be aware of how a workshop organised by academics will affect the non-academic participants. The role of the facilitator/mediator is key to dealing with these group dynamics.
- Identify stakeholders - who are they, or how are they to be included?

“Get participants who have information, do research, are articulate, get some consumers, get ‘movers’ and ‘shakers’, not token people.”

- Do not choose participants for “optics”, choose them based on objectives. One informant suggested, “get participants who have information, do research, are articulate, get some consumers, get ‘movers’ and ‘shakers’, not token people.”
- Marginalised groups - Aboriginal people (Native, Métis, Inuit), people of Colour, disabled people, the poor, lesbians, religious communities, people identified with “controversial” genes: bring these groups to the table by asking what they want and taking their suggestions seriously; give assurance of not proceeding without them; give them power; accommodate their needs and voice; for example, Aboriginal women’s groups will likely want representation from each of the 3 main Aboriginal groups before participating; some groups prefer to send 2 representatives; community groups may have suggestions as to how to structure workshop in a format conducive to community, not just academic participation.
- For more established political groups, you have to “sell” the relevance of your chosen platform and objectives - be clear that they are of political relevance and will be a political force.
- Keep an endless list of contacts and stay in touch throughout planning process to maintain good working relations and ensure commitment. In other words, inclusivity is important even in the planning stages.

•5. *Communication and Preparatory Materials*

•Establishing and maintaining communications prior to workshop is important for inclusion, to communicate goals and maintain group focus and to prepare for longer-term networking. Some suggestions:

- Listserv and E-mail Communications prior to and after workshop:
 - Must be actively managed and focused
 - Be clear about who can be on listserv - recommended that it be exclusive to conference participants and issue at hand

- Web page prior to and after, in order to facilitate exchange of information & research (from participants and organisers), publish updates and newsletters, and provide for public access/education
 - Use “Last updated” and “New” as tags so that browsers do not have to go through old material each time they log on for updates
 - Keep it simple (i.e. avoid a lot of pictures, or have them optional or on links for downloading) so that loading website is quicker and more accessible by all software/hardware configurations
 - Be aware of issue of accessibility of a web page - who can access it and who can't?
 - Computer conferencing can be a useful model for ongoing communication. For example, there is a “Webnet” company in Toronto that will set up this ongoing exchange for groups.
- Newsletter - reports from Centres of Excellence, participant updates, etc. (may be circulated on listserv or posted to web page)
- Mailings to Participants - Preparatory Materials:
 - Official Invitation (mail as soon as the workshop date and participant list confirmed)
 - Participant directory - a list of contact information, who does what (include workshop organisers on list); if networking before workshop is desired, this list should be sent as soon as it is confirmed. Otherwise (or additionally) a finalised list can be distributed at the workshop.
 - A statement of goals/objectives for the workshop must be clearly articulated; include a list of what is expected of participants so that they will be adequately prepared; disclose any concerns, anticipated tensions/difficulties. In terms of expectations, it is appropriate to provide guidelines outlining how the participants should prepare for the workshop. For example, list questions that will help participants identify and frame the issue in their own terms. It is fair, and far more effective/efficient time-wise, to expect participants wishing to have a voice on the issue to have their position and concerns formulated in advance. If participants are not

prepared to do their own homework beforehand, they can not expect to have a voice at the table. However, if lack of resources/funding is preventing groups from having a forum for identification of their own concerns, perhaps the provision of funding for their own internal (even a one day, on-site) preparatory workshop is necessary. This might be especially relevant for community groups who do not have the same access to resources as academics. Providing them with resources to do their own work before sitting around a table with academics and other groups may help to address issues of inequality and privilege which often arise in community-academic work.

It is important to have some select discussion papers in order to work from “common ground”. Select brief yet detailed papers that highlight, summarise and raise specific issues for focus.

- “Issue-related” material, discussion papers, proposed models, samples of similar groups’/conferences’ recommendations. You may wish to have some feedback on papers by commentators before workshop - this will affect the timing of the mail-out and may be facilitated by a listserv or webpage (here again, recognise that not all participants may have access to this medium). It is important to have some select discussion papers in order to work from “common ground”. Select brief yet detailed papers that highlight, summarise and raise specific issues for focus.
- Agenda should be received at least 10 days in advance.
- Do not assume that all materials will be read by participants, however in pre-workshop communication, strongly encourage participants to do their reading. This is one reason for having a facilitator/informant present, i.e. to help fill in knowledge gaps. (See Section II, 1) Facilitation for discussion of informant role.)
- Not all materials have to be circulated in advance. Material can be displayed on site, i.e. books, educational materials, video tapes.

Keep it simple - do not over-do amount of prep work required. Also, all documents and materials should be available in plain, accessible language

- Keep it simple - do not over-do amount of prep work required. Also, all documents and materials should be available in plain, accessible language.

6. Timing

It is difficult to establish a blanket timeframe for the preparation of a workshop, as the timeframe is dependent on a variety of factors such as available human resources, availability and accessibility of participants, level of experience on-hand, momentum already in place, and the capacity to draw on already-established resources/contacts. Given that workshops of relevance to the scope of the WGWNG's plans tend to rely heavily on part-time and volunteer work, and involve a diversity of cross-sectoral and nation-wide participants, a planning timeline of 9-12 months would be recommended. The two months just prior to the workshop are the most intense. Recognise that more work/time will be invested in the workshop than anticipated. It is also recommended that until funding is secured, no finalised decisions should be made, as an unexpected reduction in funding would mean having to repeat much of the planning process to accommodate for the gap in financing. However, establishing objectives and setting a tentative workshop date, timeline and preliminary participant list should be done as soon as possible.

II. WORKSHOP STRUCTURE

Each agenda item should have a goal listed beside it (i.e. to inform, to discuss, to decide) and a tentative time allotment

The agenda needs to be both well focused to keep the workshop activities on track and flexible to accommodate the group dynamic. Specifically, each item (or question requiring response) should have a goal listed beside it (i.e. to inform, to discuss, to decide) and a tentative time allotment. Workshop structure should reflect and facilitate the objectives outlined earlier on in the planning process. As workshop objectives will vary, the choice of a corresponding workshop format must be made on a case by case basis. A variety of options and suggestions are presented here, most conducive to a consultative and interactive format.

Facilitation

The use of a skilled Facilitator is strongly recommended... "facilitator skills are not the equivalent of common sense. Rather, they are technical skills acquired through training and extended practice."

The use of a skilled *Facilitator/Mediator* is strongly recommended. It has been emphasised that "facilitator skills are not the equivalent of common sense. Rather, they are technical skills acquired through training and extended practice." Specifically, a facilitator should be skilled at the following:

- Interaction management (i.e. drawing out quiet members, identifying and mediating power dynamics, disagreement management)

- Conflict management (understanding subject of conflict, personal conflict styles, strategies for management)
- Group observation methods (how to step back from group to see what is occurring)
- Maintenance of group focus and synthesis of group work. It is not effective to have the group set the agenda together, although some flexibility is necessary.

Disclose tension/conflicts by allowing them to emerge so that they can be dealt with openly and in a constructive manner.

The facilitator should be a neutral third party in order to avoid biased facilitation. Her neutral status will also protect her from being the potential object of tension and anger, and will allow her to resolve disagreements that an involved party cannot. However, tension/conflict should not necessarily be viewed as negative, i.e. if everyone agrees about everything, you have to wonder if the necessary discussions and debates are taking place. Disclose tension/conflicts by allowing them to emerge so that they can be dealt with openly and in a constructive manner. Other key points:

- A head facilitator should be involved in the prep work for the conference, in order to be briefed about workshop content and goals, to learn about subject matter, to prepare for potential conflicts and opportunities, and to provide training to other facilitators. Other facilitators for small groups should be trained at an earlier workshop, preferably by the head facilitator. 3 facilitators are recommended for a group of 40 participants. The facilitators must make themselves available for consultation with organisers in advance of the workshop (to be briefed about workshop goals, potential conflicts, etc.).
- A periodic commentary/summary by facilitator during group work helps keep everyone on line and move group work forward.
- Facilitators should be capable of striking a balance between tasks (i.e. problem-solving, getting work done) and process (group interactive dynamics).

- She should have a working knowledge of subject matter, but not necessarily expertise: “Facilitators who are also experts in the substance of the project may get too involved in the technical details of the project instead of focussing on their essential climate-setting role.” She should, however, be prepared to provide opening comments and presentation of issues/information (about 10 min.) to group, as well as keep group informed throughout discussion/work and weed out things that are not pertinent to issue at hand. This is an “informant” role that may also be assumed by an individual other than the facilitator. However, in order to keep the process simple/clear, combining the facilitator/informant roles is advisable.

2. Informal Interaction

Informal socialising is very important to build networking. Do not over-structure agenda.

Informal socialising is very important to build networking. Do not over-structure agenda (i.e. leave gaps for socialising). Suggestions:

- Have participants arrive early to socialise over snack/coffee before formal sessions start.
- Arrange for entertainment (i.e. music, a social or cultural event, etc.) for evening, but be sure to make clear that attendance is optional.
- Structure meals, snacks in a way that facilitates interaction - i.e. leave plenty of time, set out food/drinks in a contained area.
- Leave some meals open to allow participants to make own plans and engage in their own form of socialising.

3. Formal Interaction

A Keynote speaker and/or Chair should open proceedings. She must be reliable to

- provide introductions (people want to know who is who)
- articulate conference objectives in a clear/focused way
- outline agenda, instructions regarding facilities, etc.
- frame issue well.

Each day's activities should be opened with welcoming remarks, some humour or other "light" discussion, followed by a summary of the previous day's work and the upcoming day's agenda. Similarly, each day's activities should be concluded with a review and participants should be given the opportunity to offer comments/feelings about the day's activities and offer suggestions.

Formal speakers and presentations should punctuate rather than dominate the agenda... You do not simply want a presentation of papers and then discussion - this is too "academic". Instead, core activities should be small group work and discussion.

In order to facilitate maximum participation between participants, formal speakers and presentations should punctuate rather than dominate the agenda, i.e. they should never be scheduled back-to-back. You do not simply want a presentation of papers and then discussion - this is too "academic". Instead, core activities should be small group work and discussion, preferably in a roundtable format. Suggested numbers for a working group are 5 to 10 people. When dividing into small groups, decide whether or not you want all of the small groups working on the same themes, or whether each group will have a separate focus. One suggestion is to start the conference with small groups working on similar themes, in order to facilitate a common basis of understanding, and then move onto separate themes as momentum builds, in order to be more efficient with the time. Participants may offer suggestions and/or specify which particular theme they are interested in working with. When dividing participants into small groups, be aware of how each collection of individual participants might affect the proceedings in terms of working together constructively. Anticipate potential conflicts and the development of factions. Participants who know and are used to working with each other may leave others feeling left out with their "camaraderie". Also, group members who share similar backgrounds will tend to direct group work toward their shared modes and language or interaction.

The following suggestions are intended for small group work, however they are applicable generally to interactive group work:

- The role of facilitator/mediator/informant is key
- Have a list/chart/overhead displayed at front of group that specifies the activities the group is to engage in, in order to maintain clarity and focus
- Allow time for introductions
- Have someone take notes in order to facilitate reporting back to larger group / plenary session; the facilitator may choose to do this on an overhead or flip chart so that participants can follow the progress of the discussion more easily. Another option is to assign a third-party note-taker to each small group who would work with the facilitator in synthesising group discussion for the plenary session.
- It might be useful to assign roles to participants within groups in order to encourage participation and a sense of ownership and responsibility towards the mediation/facilitation process. Roles may be assigned in advance of workshop if preparation is needed. Otherwise, they can be negotiated in small groups at workshop. Examples:
 - Task roles (“critical thinker” roles): information seeker, information giver, critical evaluator, opinion giver, elaborator and summariser
 - Procedural roles: recorder, timekeeper, procedure developer, or progress evaluator; these roles help to keep the group on track and make all aware of the group process.
- May wish to keep speaker list
- *At the end of each session, allow each participant two minutes to speak without interruption.*
- Effective interaction does not have to be “dry”. The incorporation of brainstorming sessions, role plays and other alternative/creative formats might be equally effective and even provide needed breaks from discussion. In discussing an issue and potential action, it might be useful to refer to or simulate an example or case study. Engaging participants might also involve interactive written materials, for example, a workbook that lists questions and written exercises, with space provided for responses, in order to highlight key

themes for workshop. It also provides a useful take-home exercise that the participant can use to work from for her own educational purposes.

- A constructive exercise is to attempt to frame action-oriented suggestions in a “to do” voice, rather than a “not to do” one, so that participants stay in a proactive mode
- At the end of each session, allow each participant two minutes to speak without interruption.

Reporting back to the plenary session is important to maintain communication. The facilitator would be most effective at identifying key points. She may choose to present a synthesis of group work, referring back to notes made on an overhead or flipchart, and then providing the small group with the opportunity to make additions/corrections. The head facilitator or another individual may wish to, in turn, synthesise all of the small group reports onto an overhead or flipchart so that results are easier to review and are accessible to all participants.

At the end of the workshop, plan a wrap-up session where an attempt is made to draft recommendations and/or arrive at consensus where appropriate. The synthesis of small group reports will aid in this process. Before closing the workshop, allow every participant a “last word” without interruption.

Alternatively, the Consensus Development Conference of the National Institute of Health organises an independent panel to observe workshop proceedings and synthesise material and issues raised. On the final day of the conference, the panel then circulates its recommendations for discussion. Conflicting recommendations are resolved and at the end of the conference a consensus statement is formally adopted. When consensus cannot be achieved, the statement reflects this by acknowledging uncertainties, options or minority viewpoints. The workshop facilitator(s) and note-takers may be well-situated to synthesise the group work into a set of recommendations or consensus statement that would then be presented to the larger group for approval and

comment. This role could also be assumed by one skilled individual who is knowledgeable about the subject matter.

4. Workshop Facilities: Physical Set-up

Ideally, the layout of tables should be in a “U” shape, so that participants can all see each other, make eye/facial contact, etc. The facilitator should work from the front of the “U” and avoid standing behind a table or similar barricade that might create a psychological and physical communication barrier. Small group work should take place in a similar arrangement, or around round tables. Visual aids, i.e. flip charts, overhead projector, are important cues for visual feedback.

III. FOLLOW-UP / CONTINUITY OF NETWORKING

Have participants provide feedback. Suggestion: hand out an evaluation form at the beginning of the conference so that participants can make notes and evaluate the process while engaging in it. An executive report and conference summary should be forwarded to all participants. In addition, having a consensus statement or set of recommendations is useful in terms of facilitating networking and publicity. Such a document can be forwarded to government officials, healthcare associations/organisations, community groups, the media, journals, newspapers, newsletters and other targeted organisations and venues. Another option is to make audio and/or visual recordings of workshop proceedings available.

In addition to contacting participants on an individual basis for feedback and an assessment of their receptiveness to continued networking, the following modes of communication are encouraged:

- Conference calls
- Mailing lists
- Listserv and E-mail Communications
- Web page
- Follow-up workshops/meetings.

- Used media effectively (i.e. media releases) to increase/maintain visibility of issue

IV. SUMMARY

• In summary, I will start with a list of suggestions/comments made by informants who have had experience organising and holding similar workshops/conferences:

- Be sure that Funding/resources are adequate for goals/size/scope of workshop
- Assume it will take more work/time than anticipated to prepare
- Be sure to stay within means and do not take on more than is feasible - if the organisers are burned out, there is not enough energy left over to continue work/networking
- Challenge: it takes a lot of energy to keep up to date with issues
- Have professional conference people organise it
- Make use of skilled facilitators - pay good money if necessary, in order to get an experienced and neutral mediator.
- Choose participants based on how you know they will interact in the group - do not choose participants for optics
- Clear guidelines about nature of discussion are needed in order to deal with potential conflict
- Do surveys in advance to be sure the participants are on course with the conference objectives
- Have a website up and running in advance to facilitate communication, exchange of info
- Set up computer/internet conference on "Webnet" for organising - this is a very effective medium
- Be sure that prep documents are not repetitious nor too time consuming and distribute them far enough in advance for participants to read them before workshop date
- Have participants respond to prep materials/articles in advance of workshop (i.e. as commentators)

- Disclose tensions and possible criticisms before hand so that participants are not surprised by attacks or unanticipated issues/tensions arising - i.e. be sure they all know what to expect
- Give participants opportunity to meet “privately” before the public meetings/sessions start
- Allow participants more time to meet as separate groups, organised around specific topics and special interests so that they can sort out their own views and then choose a spokesperson to present to the larger group
- (For small groups): allow each group member opportunity to speak and voice their position for 2-3 minutes uninterrupted and unchallenged, before debate opens up - moderator could then draw out specific issues that were raised
- Videotape proceedings - this is useful for future work
- Use media effectively (i.e. media releases)

It might be useful to point out that some of what you have read here appears to be contradictory. This is simply because I am attempting to account for and anticipate several sets of options that apply to differing workshop objectives. Rather than attempt to draw out any key points, I believe it will be more useful to provide a context within which to assess the report contents. On a simplified level, there are three stages to defining a strategy for action on an issue:

grounding/identifying an issue by acknowledging its relevance, and sharing experience of the issue at hand

defining the issue by analysing its roots and subsequently identifying goals and objectives for dealing with the issue

developing the strategy, which includes identifying stakeholders, contemplating and deciding on a strategic approach, and anticipating results.

Ideally, given adequate time, opportunity and resources, stage 1) should already have been addressed by participants attending a strategic workshop. Otherwise, knowledge of the issue is not satisfactorily formulated to engage in strategic planning. On the other hand, stage 2) defining the issue, is more pertinent to a strategic workshop format. However, it only addresses the initial step in strategic planning, and would not be adequately complete if the final stage, 3) developing the strategy, is not reached. Deciding which level to intervene at, while facilitating group interaction and networking, is perhaps the most fundamental decision in terms of identifying objectives. In closing, I will emphasise that meeting the identified objectives requires, above all: focus, transparency/clarity of intent, and strong facilitation/mediation skills.

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