

How To Organise A Workshop For Your Annual Plan (354)

The level of participation by your route members in route activities and projects is one of the most important factors that will determine your route's success. Your members have access to many resources and, since they are involved in their own tourism businesses or initiatives, they are also likely to have insight into what approach would work best for the route. This is why organising a planning workshop is the best way for your route to identify what you should include in your annual route plan.

In this Guide, you will find advice on organising and structuring a route workshop as part of the process of compiling your annual route plan. The context and format of such a plan is covered in other Guides in this toolkit, which you should also consult while you are organising your workshop.

Why is the route planning workshop important?

While there are many ways to motivate members to participate and to get their inputs on what the route should be planning for, the most powerful way to involve members in planning is through a workshop.

The workshop format is perfect for bringing people together, engaging them through structured questions and educational exercises, and then recording their inputs in such a way that it shapes the annual route plan. It also gives the busy route members the assurance that they can dedicate a limited amount of time for their input to be included in the plans for the route in the coming year.

What is involved in running an annual plan workshop?

The better prepared you are for your planning workshop, the more likely you are to get strong involvement of members and the more likely you are to come up with good plans for your route. What follows is a summary of the most important aspects of preparing for a successful workshop.

Timing

The date and time that you select for your workshop is very important, since it will determine members' participation levels. It is worth first identifying a few possible dates and checking with members how these fit with their programmes, and only to confirm the date after feedback was received.

The time you set aside for the workshop will depend on the extent of reflection and planning needed. For an annual planning workshop, it may be worth setting aside a full day and, if you anticipate that you need to reconsider the full extent of the route's purpose and objectives, more than one day may be needed. However, it is possible to present a productive workshop in shorter periods, such as three or four hours, but if the time allocation is too short, it is likely to become **a meeting, in which plans are discussed, rather than a workshop, in which new ideas are generated.**

Venue

The venue selected for the workshop should offer a quiet space where members will not be distracted. It is preferable to host the workshop away from where members' normal activities have the potential of interrupting their participation. It does not need to be luxurious, but comfort is a requirement.

Ease of access is a requirement, but it is not a good idea to

select a venue where members will be tempted to slip away to other attractions in the immediate vicinity.

Seating at the venue should preferably give all participants equal status. Use of a U-shaped table set-up or circle works well, even if two rows of tables are needed to accommodate everyone.

Organise the presentation equipment and flipcharts you will need beforehand and ensure that the needed power plugs are available and functional. Also remember to organise enough pens and paper for members who may need it.

Programme

The planning workshop task team should carefully consider the workshop programme and the desired outcomes. The activities included in the programme should lead proceedings towards the desired outcomes. The example of a workshop programme included in the toolkit should offer a good framework for your route to use as a starting point in deciding what you need to include in your planning workshop's programme (see Resource: [Template: Programme Outline For Annual Planning Workshop](#)).

Activities and Exercises

The programme should be designed in such a way that there is natural flow of proceedings and ideas. This can be achieved by combining exercises and activities with individual writing, group chats, report-backs and open floor discussions. A balance in variation is the best way to ensure progress and to keep participation levels high. There are many online resources available to get tips on how to keep proceedings lively (a Google search will deliver many ideas), but do not overdo it – keep the balance right!

Facilitation

The purpose of the workshop is for the route to reflect on its past activities, to consider where it wants to go in the next

year, and to allocate responsibilities. It is advisable to appoint a facilitator to keep engagement levels high and to ensure that the workshop covers what needs to be covered. For this reason, it works best to have a skillful facilitator who does not have a key role or any role in the route, if possible. In some instances, an Open Africa routes co-ordinator maybe available and may serve this role well.

Record-keeping

A workshop is not like a meeting, where minutes needs to be kept of the discussions and decisions. However, it is very important that the ideas, suggestions, initiatives, activities, objectives and any other relevant information that is generated is collected and recorded in a format that can be used in producing the annual route plan document. If flipcharts are used during the workshop, the newsprint sheets may be perfect for recording during the workshop, but they will have to be captured as text on a computer for use during the documentation of the plans.

Task allocation

A great workshop will come to nothing if you are not focused on capturing the tasks generated during the workshop and allocating these to individual members to complete by a specified deadline. One of the key tasks of the annual planning workshop will be the creation of a year plan document. Ideally, you would want to allocate this task to a person or task team known for attention to detail.

Who is involved in organising the workshop?

The route's Chairperson should take a direct interest in the preparation for the annual planning workshop. However, he or she may not be the best person to facilitate the workshop,

because of the important role he or she plays in the route's activities. It may be best to appoint a facilitator for the workshop who is good at managing a process, understands the issues involved, and has an easy way of getting people to participate.

The Route Forum should identify a suitable date for the workshop that will suit most members. A task team should be appointed to prepare for the workshop, with the Chairperson, facilitator and two or three more members. This task team will be responsible for inviting and reminding members, setting out the workshop programme, organising the venue and catering, and all other aspects relating to the planning workshop.

Member participation is what the workshop is about, so they should be the focus of the proceedings.

The workshop programme may also include inputs or delivery of a presentation by an outside expert or official of an important associate organisation.

How to present the planning workshop in your route

The Route Forum sets the stage for the annual planning workshop and hands responsibilities to the task team. From then on, it remains the task team's task to ensure that the preparation is done, that members attend, and that the proceedings run smoothly

Practical tips

- Clearly define the desired outcomes – the Route Forum should define the outcomes before the task team is appointed to prepare for and organise the workshop.
- Good preparation is essential – appoint a task team to plan for and deliver the event.

- Neutral facilitation is desirable – if possible, get a person outside the route to facilitate the workshop.
- Double-check logistics – workshops can be ruined by little things (power cords, noise outside, or any other unforeseen issues that may arise).
- Make it exciting for members – invite members and emphasise something new or exciting to motivate them to make an effort to come to the event.

Use of this Guide

This Guide focuses on the process of organising a planning workshop. It will help those who are organising the workshop.

Other Fact sheets

You may also want to take a look at the following Guides and Examples, which cover related topics:

- Guide: [How To Unite Your Route Behind A Shared Purpose or Vision](#)
- Resource: [Template: Programme Outline For Annual Planning Workshop](#)
- Resource: [List: Places To Find Tips On Running A Workshop \(532\)](#)