

Quick Guide to Plan a Productive Gathering



Step 1: Why? Define your goals.

Key questions to ask yourself:

- How will this gathering (meeting, workshop, session, etc.) contribute to achieving our outcomes, objectives or deliverables?
- What are our strategic, tactical and relational needs?

Some helpful places to start thinking about your potential goal/s are:

Upcoming deliverables, especially those that may be delayed or faced with unforeseen challenges.



Decisions, particularly ones that require input or deliberation with multiple stakeholders.



Commitments needed to make progress on milestones.



Relationships, within the team or with others that may enhance communication, learning, collaboration, sense of belonging, etc.



Step 2: Who? Identify and understand your participants.

Key questions to ask yourself:

- Who needs to participate in order to achieve the goal/s of the gathering?
- What do participants **already** do, know and feel in relation to the goal/s?
- What would you like them to do, know and feel **after** the gathering? Check out the examples below for inspiration.

Example 1:

Science behind reserve networks.

Talk to others about the importance of creating science-based reserves.

Confidence the reserve will be in the right place.



Example 2:

Projects others are working on.

Identify opportunities for cross-functional collaboration.

Connection between work streams and colleagues.

The **Kirkpatrick Model** helps connect Results (outcomes) to Behavior (action) to Learning (knowledge and skills) - which brings a greater sense of cohesion to gatherings.



Unsure about your participant's current level of knowledge, skills and attitudes? Conduct a survey or have a brainstorming session on what they would like to know, do and feel as a result of the gathering.

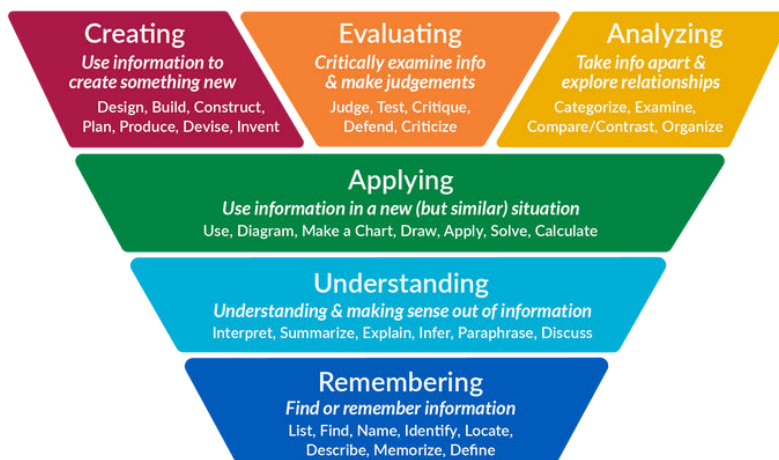


Step 3: What? Define your SMART objectives.

Craft your [SMART](#) learning objectives based on the skills, knowledge and feelings you want your participants to attain. Use [Bloom's Taxonomy of Learning](#) and this handy formula:

By the end of [gathering], participants will [action word] a [skill, concept or attitude] by [condition].

Taxonomies of Learning



Step 4: How? Plan your gathering.

Give yourself enough time to:

- **Identify** the team (facilitators, presenters, helpers) needed to accomplish your goals and objectives.
- **Review and update** your goals and objectives collectively.
- **Co-create** an agenda with a variety of activities. Check out the examples below.
- **Consider** opportunities to leverage participants' expertise, for example: sharing of best practices, presenting a brief case study, co-facilitating a session or leading a group activity.
- **Assign roles** for each segment of your gathering, such as: facilitator, documenter, time keeper, logistics and tech support.
- **Check-in** with the team frequently to verify all roles, resources and support are covered. For priority gatherings, organize a "dry run" of the full event.
- **Book** a debrief meeting with the team to assess the gathering, share results and learnings!



Fun: Icebreakers, team builders and energizers.



Multi-modal: Auditory, visual, verbal, kinesthetic, social, reflexive and experiential.



Evaluation: Assess participants' reactions and learning.

A condition is how participants will demonstrate learning, for example: they will use a tool [skill], list at least X number of features [knowledge] or describe how they can positively impact their community [attitude].



Given your and your participants' resources, if the team feels you are not able to accomplish all your goal/s and objectives, consider alternatives like a blended approach (self-guided + collective activities) or plan multiple gatherings over a longer period of time.

Hub Byte

Plan a Productive Gathering



Step 1: Why? Define your goals.

- How will this gathering contribute to achieving our outcomes, objectives or deliverables?
- What are our strategic, tactical and relational needs?



Step 2: Who? Identify and understand your participants.

- Who needs to participate in order to achieve the goal/s of the gathering?
- What do participants **already** do, know and feel in relation to the goal/s?
- What would you like them to do, know and feel **after** the gathering?



Step 3: What? Define your SMART objectives.

- What skills, knowledge and feelings will participants gain? Use Bloom's Taxonomy of Learning and this formula:

By the end of [gathering], participants will [action word] a [skill, concept or attitude] by [condition].



Step 4: How? Plan your gathering.

- **Who** should be on the planning team, i.e. facilitators, documenters, set-up support?
- How will **goals, objectives and roles** be clear to all involved?
- What opportunities exist to **co-create the agenda**?
- How will **activities balance diverse participant needs and preferences**?
- How might **participants' experience and expertise** be leveraged?
- When and how will regular **check-ins** and a **final de-brief** take place?