

Workshop Checklist

Description This tool aims to provide guidelines to carry out any planning activity as a workshop, to allow for more participation, collaboration, and interaction. Workshops can take place in-person, online or hybrid modality, according to available resources, physical and public health conditions, needs, and objectives. Both formats can be combined in different activities along a planning process.

Participants This activity is carried out by the technical team.

In-person workshop

Participants gather in the same physical space to carry out an activity in a participatory way.

Considerations:

- Ideal when participants are located in the same community or city.
- Face-to-face discussions provide more interaction and engagement.
- The number of participants is restricted to the size of the physical space available.
- Availability of resources should be ensured (avenue, catering and sketching materials or printouts)

Online workshop

Participants meet online synchronously (at the same time) using a digital tool.

Considerations:

- Ideal when participants are not located in the same geographical area.
- Ideal when conditions do not allow for physical contact, such as the implementation of public health measures or limited resources for commuting.
- Can allow for a large number of participants.
- Internet access and digital fluency are required.
- Can be more cost-effective (if free digital tools are used). No need for sketching materials or printouts.

Hybrid workshop

Some participants will gather in the same physical space and some of them will be attending remotely (at the same time) using a digital platform.

Considerations:

- Ideal when there are conditions to hold an in-person workshop but some participants are not located in the same geographical area.
- It is important to create ways of interactions and connections with participants in the room and those who have joined remotely.
- Ensure that everyone has access to the same tools whether they participate in the room or virtually.

Workshop general guidelines

Preparation

- Define if the workshop will be carried out in person, online or hybrid.
- Set a date, time, and place (if it is in-person) or digital tool (if it is online) to implement the workshop.
- Create a facilitation guide outlining the specific activities that will be conducted and the duration of each one. Set a time at the beginning to share the workshop's objectives and for participants' introductions.
- Identify and make a list of participants, using an excel spreadsheet to gather their details. These will vary according to the activity.
- Extend invitations to participants. Include the workshop's objective, date, time, duration, address or link, and a method to confirm guests' participation (by email, digital form, text message, phone call, etc.).
- Assign roles and responsibilities.
- Prepare all the materials needed. For in-person workshops, set the room and furniture layout in advance. For

Workshop Checklist

online workshops, test the digital tool beforehand to get familiar with it and solve any technical issues.

Roles

Participant-facing roles (they interact directly with workshop attendants)

- Facilitator: presents the workshop's objectives and instructions, and facilitates activities, and discussions.
- Content note-taker: writes down, collects, or pins up the content being discussed on a wall, board, paper or any surface used during the workshop. Sometimes this person can be the same as the facilitator.

Backstage roles (provide support)

- Workshop note-taker and photographer: documents how the workshop is developed — such as the topics discussed, the participants' reactions, activities and possible iterations — and takes photos of the process.
- Time keeper: makes sure that the workshop schedule is kept on time. Let the facilitator know when there are 10, 5, and/or 2 minutes left for an activity so they can wrap up.
- Logistics/technical support: provides assistance in any logistical or technical issue that comes up especially in digital meetings, e.g. room control, screen share content, audio check etc.

After the workshop

- Gather feedback from participants to evaluate the content (impressions and learnings) and format (what worked well and what can be improved). This can be done by handing out a questionnaire at the end of the workshop, or by sending out an online survey. You can find a questionnaire sample at the end of this tool.
- Share the materials used and produced during the workshop (presentations, videos, photos, maps, etc).

In-person workshops

List of materials: define according to the type of activities and workshop's objective.

Space & furniture:

- A large enough room/space to fit all participants (complying with public health measures).
- A designated central space for the facilitator to present the activities and goals.
- Tables (without tablecloth) arranged in groups. All participants should be able to see the facilitator.
- Chairs for all participants.
- Pin up board, white board or a blank paper board to hang, pin up or draw notes and results. *[For the facilitator and/or the content note-taker.]*
- Pins or adhesive tape for pinning up and markers for drawing. *[For the facilitator and/or the content note-taker.]*

Drawing & sketching tools:

- Rolls of tracing paper of sufficient size to sketch on top of the maps. *[80cm roll for A1 or double tabloid. 2 rolls per group. Make sure the paper is transparent.]*
- Thick drawing markers. Provide different colours: black, light green, light blue, red, yellow, brown, orange. *[One set of colours per group.]*
- Black fine liners and pencils. *[2-3 per group.]*
- Coloured sticky notes.
- A stack of white A3 or tabloid paper. *[To distribute upon needs.]*
- Rulers of sufficient length to measure distances on provided maps. *[If applicable.]*
- Cardboard and scissors. *[If applicable.]*

Other technical equipment:

- A video projector of reasonable quality (minimum resolution 1024px, higher if available), bright enough to see in non-darkened rooms. A sufficiently large white surface to project on. *[Upon availability. It will be used to project the workshop content.]*

Maps & documents:

- Printed Our City Plans tools and worksheets.
- Printed base map(s) and aerial image(s) of the municipality at reasonable scale (suggested 1:5000) and size (suggested A1 or double tabloid). *[One set of maps and aerial images per group.]*

Workshop Checklist

- If a video projector is not available, a TV screen can be used.
- Sufficient plugs and extension cords for laptops and screens. *[These will be used to connect to the projector.]*
- Camera or cell phone to take pictures.
- Existing planning documents, upon availability. *[Everyone should be able to see them.]*
- Set of photos considered useful to illustrate the area of study. *[One set of photos per group.]*

Online workshops

Digital tools: select according to specific purposes and workshop exercises.

Purpose	Tools
Video conferencing, meetings, workshops, webinars,	Zoom , Google Meet , Microsoft Teams Facebook Live, Instagram Live, Youtube Live (for webinars and virtual events)
Collaborative documents, spreadsheets, presentations	Google Docs , Google Sheets , Google Slides
Brainstorms, digital boards, collaborative design	Miro , Invision , Mural , Notion , Google Jamboard
Surveys	Google Forms , KoBo Toolbox (asynchronous) Mentimeter , Poll Everywhere (synchronous, for interactive questionnaires during presentations/workshops).
Invitations, event communications	Mail Chimp Social media (Whatsapp groups, Facebook, Instagram)
Project management	Trello , Monday , Asana

Workshop evaluation questionnaire

Overall, how do you rate this workshop?

☐ Poor ☐ Fair ☐ Good ☐ Very good ☐ Excellent

How much do you agree with the following statements?

1 = Strongly disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree

The workshop was useful	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
The workshop objectives were stated and clearly met	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
The workshop was well organised	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Activities and discussions were well facilitated	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
The length of the workshop sufficient	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5

What was your main take-away/learning from today's content and discussions?

Workshop Checklist

.....

.....

.....

What did you enjoy the most?

.....

.....

.....

What did you enjoy the least?

.....

.....

.....

Do you have any suggestions on how to improve this workshop?

.....

.....

.....

(Additional questions)

.....

.....

.....