

How to use this resource

This guide provides an outline and tips for running a scoping workshop – a useful process for bringing key stakeholders together to refine and plan the work of the taskforce.

The workshop can be run as a single session, or broken up into modules, depending on your needs.

Choosing a facilitator

It's helpful to appoint a facilitator to lead the session and keep everyone to time so that the workshop is as effective as possible.

The facilitator could be:

- a member of the taskforce team
- a member of your agency's strategic policy team
- a colleague external to the taskforce
- an externally sourced, professional facilitator, like a consultant.

The facilitator should be provided with an overview of the taskforce's focus and origins, and be across the content of the Taskforce Toolkit.



Guidance for facilitators

- Tailor the workshop to the needs of the taskforce – you should work with the taskforce leader to understand their expectations and identify what needs to be covered.
- Help the taskforce leader to identify attendees – this should include the whole team, as well as key stakeholders; representation and a diversity of views is important for a scoping workshop.
- Determine what pre-reading or guidance needs to be provided to participants before the workshop (for example, a literature review or discussion paper) and provide opportunities to reflect on these during the workshop.
- Ensure the workshop is scheduled for a time that works best for everyone, preferably in the morning. A large room with wall space is helpful to allow plenty of room for brainstorming.
- Get prepared – ask the taskforce leader for any additional background information that helps you get across the taskforce's context and focus. You should also read through the Taskforce Toolkit and refer participants to various sections as needed.
- Be clear about your role. You own the process, but not the content. Your role is to smooth the connection between people with different skills and backgrounds, and extract their insights. You are there to help them generate ideas, not generate them yourself.
- Ensure you find ways for everyone in the room to contribute – including through individual brainstorming and small group discussion.

Scoping workshop guide

Getting key insights from stakeholders to inform your taskforce planning and set up

Scoping workshops are designed to provide a common understanding of the taskforce's end goal and how to achieve it

Workshop structure

Total time = around 4.5 hours

Introduction
[Allow around 30 mins]

Part I

1

Determine taskforce & policy objectives
[Allow around 1 hour]

2

Determine key deliverables
[Allow around 45 mins]

3

Establish governance structures
[Allow around 30 mins]

Part II

4

Plan stakeholder management
[Allow around 45 mins]

5

Assess risks
[Allow around 45 mins]

6

Determine operational requirements
[Allow around 30 mins]

Introduction

Outcomes

- Understand the key purpose of the taskforce and policy background
- Understand purpose and intended outcomes of the workshops

Facilitator guidance

Present information: Discuss background of the taskforce (TF) and policy

- Why was the TF established? / What are the taskforce's objectives/deliverables?
- What is the policy context? / What environmental/strategic issues/sensitivities need to be considered?
- If necessary and if already established, present overarching governance structure of the taskforce.

Present information: Explain purpose and expectations of the workshops

- The workshops are intended to:
 - Enable the team to understand key taskforce issues and work through problems together.
 - Gather a range of views – all staff should be encouraged to participate and have their say.

Present information: Explain structure of workshops

- The six sessions have been divided into two parts as they are better conducted on separate days:
 - There is some work coming out of Part I that should be completed before Part II begins.
 - There is a lot of information to work through, which is better spread over multiple days.

Present information: Explain intended outcomes

- Discussions to be developed into written-up documents including:
 - a scoping deck (which may include some of the following documents)
 - key objectives/issues tree (preferable to finalise key objectives/issues tree before moving on to next sessions)
 - governance structure
 - workplan
 - risk assessment
 - stakeholder overview
 - business process checklist.

Group discussion or activity (optional): Support staff to get to know each other

- Invite participants to introduce themselves and outline their past experience – or have an icebreaker activity.

1. Determine taskforce & policy objectives

Outcomes

- Consider overarching policy objectives including what is 'in and out' of scope
- Participants think through key issues and major components of work
- The objective can be used to shape and clarify the taskforce's workstreams

Facilitator guidance

Individual or small group activity: Participants generate a range of possible questions to discuss

- Ask individuals or small groups to write down one or more possible overarching policy questions (around 5 minutes).
- Using insights from the group, develop a single overarching question that outlines the objectives of the taskforce and seek consensus from participants.

(Optional) Small group discussion: Participants share and refine their questions through an issues tree

- Brainstorm/whiteboard a full list of questions.
- Group the questions into related areas.
- Determine which are actually sub-questions of the primary question and build into an issues tree:
 - Sub-questions should be mutually exclusive, collectively exhaustive (MECE).

After the workshop

- If an issues tree has been created, one person or group should be selected to write up, develop and finalise the issues tree after the session. This will need to be ready before Part 2.
- The overarching question (and issues tree, if developed) can help to clarify proposed governance structures/workstreams/taskforce teams.

2. Determine key deliverables

Outcomes

- Develop a list of the taskforce's key deliverables (products and tasks). This can later be mapped against the streams identified in the internal taskforce structure or issues tree (if developed).
- After the workshop, develop a list of key deliverables, a workplan and allocate responsibilities

Facilitator guidance

Small group discussion: Generate a list of all potential deliverables

- Provide an empty workplan table for groups to populate.
- Ask groups to generate a list of everything the taskforce needs to do.
- Focus on generating a long list of deliverables – other fields of the table can be populated at a later time.
- Groups can suggest new ideas – not just existing deliverables.

Whole group discussion: Refine list of deliverables

- Each group reads out their list of deliverables.
- Facilitator adds deliverables to whiteboard, mapped against workstreams if possible.

After the workshop

- After the session, an individual or group can develop a more comprehensive list of deliverables, timeframes and responsibilities (a workplan).
- If you did an issues tree, suggest developing it in parallel with the workplan so that they are aligned.

3. Establish governance structures

Outcomes

- Discuss possible internal and external governance structures of the taskforce and build a shared understanding of what works
- After the workshop, finalise and agree governance structures

Facilitator guidance

Whole group discussion: Discuss possible internal governance structures

- Facilitator to take notes on a whiteboard
- As a group, discuss different methods of structuring the taskforce and the pros and cons of each. (i.e. separate governance or coordination team, individual policy teams)
- Facilitator to sketch out potential structures on the board.

Whole group discussion: Discuss possible external governance structures

- Facilitator to take notes on a whiteboard
- As a group, list the different decision-making and advisory groups (Ministers, Executive, steering committees, IDCs etc). Discuss their roles and how the taskforce will interact with them.
- Facilitator to sketch out potential structures on the board.

After the workshop

- After the session, an individual or group can develop the proposed internal and external structures and seek agreement from key decision-makers.
- The structures and policy teams may be influenced by the workplan and/or issues tree.

4. Plan stakeholder management

Outcomes

- Identify stakeholders and how to engage with them
- After the workshop, develop a stakeholder engagement plan and communications strategy

Facilitator guidance

Present information: Share developed products

- If not already shared with the team, present the developed issues tree (if there is one), workplan and governance structures (not critical for this session but should be shared in between Part 1 and Part 2)

Present information: Key stakeholder engagement steps

- Discuss key stakeholder engagement steps.
- The steps should be made relevant to the goals of the taskforce if appropriate.

Whole of group discussion: Identify key stakeholders

- As a group, brainstorm all stakeholders who are relevant to delivery of the taskforce's objectives.
- One person to write up list on whiteboard.

Small group activity: Analysis of stakeholder importance/influence/interest or attitudes

- In small groups, complete the most relevant 'heat map':
 - If the taskforce is not controversial, the influence/interest matrix may be more appropriate. If the taskforce is controversial, the influence/attitude matrix may be more appropriate.
- Add each stakeholder to one quadrant of the matrix.

After the workshop

- After the session, an individual or group can finalise a comprehensive stakeholder engagement plan and communications strategy, including exploring more detail stakeholders' attitudes and engagement methods, and the strategic communications approach you will use to engage and communicate with these audiences.

5. Assess risks

Outcomes

- Consider key risks to both policy and the taskforce
- Consider how risks could be addressed
- After the workshop, develop a risk assessment and plan

Facilitator guidance

Group discussion: Identify and analyse key risks (around 20 minutes)

- In what ways could the project fail? What does failure look like? (It may be useful to divide this into policy failures and taskforce failures)
- Consider the likelihood and consequences of the risks.
- Facilitator to write up ideas on the whiteboard.
- If appropriate these can be grouped into workstreams.

Individual activity and group discussion: Consider how to address key risks (around 30 minutes)

- Individuals choose one failure each. Individuals spend around 10 minutes to answer the questions: what factors could cause this failure – and how should it be addressed? Answers are written on post-it notes.
- As a group – everyone in the room reads out their responses.
- Post-it notes can be stuck on the whiteboard.

After the workshop

- After the session, an individual or group can develop a comprehensive risk plan. This may result in additional items being added to the deliverables list/workplan.

6. Determine operational requirements

Outcomes

- Ensure taskforce members have a clear understanding on how the taskforce will function
- Ensure taskforce governance or day-to-day business processes are in order
- Give taskforce members an opportunity to raise concerns and have them addressed

Facilitator guidance

Present information: Discuss expectations for how the team will work together

- What are the work styles of senior leadership and others in the team?
- How will senior leaders help taskforce members to meet their own performance goals and objectives during their time on the taskforce?
- What are the expectations for attendance/leave/flex-time/TOIL, work-life balance etc.?
- Discuss expectations of regular and open communication and how this will be supported.

Whole of group discussion: Taskforce members have the opportunity to raise concerns

- Ask participants to raise any matters of concern or suggest improvements to existing processes.
- Senior taskforce members may be able to respond to some matters immediately.
- Facilitator to write a list on the whiteboard.
- Issues that may be considered include:
 - reporting lines
 - performance management
 - individual or team responsibilities (if not already resolved as part of workplan)
 - administration of shared group email inbox and/or distribution list
 - internal leave calendar
 - staff contact details
 - taskforce meetings
 - IT arrangements.

After the workshop

- One or two people have responsibility for ensuring all items on the list are actioned.