Priority-Setting Session Guide

Customizable Agenda & TOOLS | Prepared by [FIO PARTNERS](https://fiopartners.com/)

# Instructions

Customize this agenda and exercises to get your team thinking, talking, and taking ownership of its priorities and key activities for the next year.

**Room Set-Up:**

* Ideally, the room can be set up with small tables for 3-4 people each. There should be enough room to walk around and wall space for hanging flip-chart paper.
* Five stations with sticky flipchart paper, Post-it notes, and black markers. The headers at the five stations should be Programs, Workforce, Relationships, Finances, and Infrastructure. Under each header, draw two columns to capture Key Actions and Resources Needed.

**Materials Needed:**

* Copies of the Participant Agenda, enough to put one at each chair
* Sticky flipchart paper, Post-it notes, and black markers
* Monitor/projector and laptop for presentation slides *or* flipchart sheets with:
  + Your organization’s vision, mission, and values
  + Any ground rules or discussion norms you have established
* Bonus Points: Bowl of candy (or another energizing snack) and fidgets (think toys, pipe cleaners, crafty things) at each table!

# FACILITATOR’S GUIDE (2.5-hour session)

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| Time | Topic(s) or Exercise |
| #:## - #:##  (10 minutes) | **Welcome**   * Thank everyone for coming and express your enthusiasm for what promises to be an energizing priority-setting session!   **Overview of the Session Agenda and Objectives**   * Quickly review the Participant Agenda handout, including the session objective(s) * Ask: *Do you have any questions or additional objectives we should consider?* * Follow-up question (if the room is quiet): Would anyone like to share their aspirations for today? What do you hope we get out of this session?   **Ground Rules**   * Ground rules or discussion norms are agreements that groups develop around how they will behave. A few examples include:   + Be present and curious (really listen... and put away your phone)   + Take space and make space (share your thoughts but also allow other people to speak) * Ask: *What kind of ground rules do you think we need in order to have a productive conversation about our priorities for the next year?* * Write the Ground Rules on a flipchart and then post them on the door or wall |
| #:## - #:##  (15 min) | **[Optional] Opening Exercise: Building Connections** – Use the prompts in the Appendix (or your favorite ice breaker!) to get your team talking and connecting with one another. This is encouraged if you have a mixed group who don’t all know each other (e.g., staff, Board members, volunteers, and community members). |
| #:## - #:##  (30 minutes: 10 to present, 20 to discuss) | [This content can be put in your presentation, or you can just walk participants through the concepts before opening for discussion.]  **Setting the Decision-Making Table**   * *External insights:* Note relevant broader forces (from outside-in thinking) and community conditions (assets, changes, and needs) to factor * [Optional] *Field insights:* Share any relevant trends or evolving practices in your field of service. (What new approaches are organizations trying?) * *Internal insights:* Share what you accomplished last year and quick assessments of the major strengths and needs in your programs, workforce, relationships, finances, and infrastructure. * Note that these assessments are a starting point for discussion and **invite more observations** about the organization’s challenges and opportunities. What do the participants see in their work and in the community? * **Write:** On a flipchart, draw a line down the middle of the page. Note Challenges on one side and Opportunities on the other. Create a “parking lot” flipchart for Additional Observations and Reflections. |
| #:## - #:##  (30 minutes) | [This content can be put in your presentation or on a flipchart.]  **Our annual priorities and work plan will address:**   * The major work to be done. * The actions and resources needed to accomplish that work in the next year. * To be added later: People responsible, target timing, measures or milestones, status and notes for progress monitoring and sharing.   **Part 1: Brainstorming Key Actions and Resources** (using the [World Café method](https://theworldcafe.com/key-concepts-resources/world-cafe-method/))  Exercise Setup:   * Ask tables / groups to get up and go to a station. Make sure each station has a group, and that the groups are mostly evenly distributed.   Participant Instructions:   * *“In this exercise, groups will move around the room and brainstorm key actions in each area. Based on what we’ve discussed so far, what should we focus on doing over the next year?* * *Please use the Post-Its to capture one specific action per stickie. You’ll get 5 minutes at the first station, then I’ll tell everyone to move clockwise to the next station. We’ll keep rotating through the stations about every 5 minutes until you’re back where you started. Once we’re done, we’ll talk through the actions listed in each area, look for themes, note the resources needed, and set our aspirational but realistic priorities for the next year.* * As people are moving to the second station: “*When you get to the next station, take a minute to look at the ideas that have been shared so far. Star actions that feel most important and doable within the next year, then add any additional ideas that you have. Feel free to also start noting the resources that would be needed to implement these actions or ideas.”* |
| #:## - #:##  (50 minutes) | **Part 2: Establishing Our Priorities**   * Once people get back to their original station, give them a minute to look at all the ideas that have been generated, then ask one person at each station to share some of the common themes and ideas that got a lot of stars. * Discuss as a group the emerging as priorities. Note the resources needed. Is the priority both meaningful and doable within the next year? If the aspiration is too big / longer term, is there a subset of actions that would be doable in 12 months? * Spend 10 minutes on each station. At the end, affirm the priorities that have been set. |
| #:## - #:##  (5 minutes) | **Next Steps: How do follow through on our priorities?**   * Let the group know that you will write up the final set of priorities for the year and the actions and resources that fall under them and share them back with the group. * Note that you will identify who might be responsible for leading each priority (e.g., ED, staff, Board or volunteer committees) and initiate those discussions to ensure each item has an assigned owner. * Once there is an owner, target timing and measures or milestones will be established collaboratively. Then, a shared spreadsheet will be made to track and report status updates and notes. * Thank everyone for their enthusiastic participation and commitment to the organization! |
| #:## - #:##  (10 min) | **Closing Commitment:** Name one way you can contribute to the organization’s priorities over the next year.[Go around the room.] |

# PARTICIPANT AGENDA

[logo]

**[Organization Name]**

**Priority-Setting Session**

AGENDA | [DATE]

**Session Objective:** Establish priorities and key activities for 2025 that will advance the organization’s mission and development.

**Agenda**

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| --- | --- |
| #:## | Welcome  Overview of the Session Agenda and Objectives  Ground Rules |
| #:## | [Optional] Opening Exercise: Building Connections |
| #:## | Setting the Decision-Making Table: External and Internal Insights  Discussion of Opportunities and Challenges |
| #:## | Brainstorming Key Actions and Resources |
| #:## | Establishing Our Priorities |
| #:## | Next Steps |
| #:## | Closing Commitment: Name one way you can contribute to the organization’s priorities over the next year. |

# Appendix

## BUILDING CONNECTIONS PROMPTS

**Building Connections Through Pair Share Discussions**

*Select one of the prompts below to get participants talking and connecting with one another.*

* + *Set-Up:*
    - Encourage participants to find someone in the room they don’t know well and/or have not had a chance to work with. Ask them to explore one of the suggested prompts below for 10 minutes, allowing each person in the pair to share their response.
  + *Proposed prompts* 
    - **Sharing Our Why:** What about the organization’s work inspires you?
    - **Sharing Aspirations:** As you look ahead, what most excites you about our future as an organization?
    - **Sharing Superpowers:** What skills or “superhero powers” do you bring to the organization? What would you like to bring more of?
  + *Closing the Exercise*
    - Ask each person to introduce their partner and something they learned about them.

## Work Plan Tracking Sheet

*Bring the table below into Excel or Google Docs, complete it, and share it with all responsible parties. It’s fine to focus on one priority per area—Try not to have more than two priorities per area since this is a one-year work plan.*

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| **Priority Area** | **Key Actions** | **Resources Needed** | **Assigned to** | **Target Timing** | **Measures or Milestones** | **Status\*** | **Notes** |
| **Program Priority 1** |  |  |  |  |  |  |  |
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| **Program Priority 2** |  |  |  |  |  |  |  |
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| **Workforce Priority** |  |  |  |  |  |  |  |
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| **Relationship Priority 1** |  |  |  |  |  |  |  |
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| **Relationship Priority 2** |  |  |  |  |  |  |  |
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| **Financial Priority** |  |  |  |  |  |  |  |
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| **Infrastructure Priority** |  |  |  |  |  |  |  |
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\* *Not Yet, In Progress, Delayed, Completed*