

## IDEA JOURNEY IN-PERSON LOGISTICS

### For virtual workshop logistics, speak to your IDEA Journey partner

The following checklist is provided to make sure all logistics elements of the Imagine Workshop are covered:

#### **Dates**

Ensure target dates are 3-6 months out. Scheduling top executives is exceedingly complicated and it is critical to have as much C-level participation as possible. On timing also see **Transportation** below.

#### **Venue**

It is recommended that the location of the Imagine Workshop be off-site to minimize interruptions. Please discuss this early with your IDEA Journey partner.

#### **Participant List**

In addition to subject matter expertise, it is important to target as broad a cross-section of the organization as possible: multiple diverging perspectives, from top to bottom, across departments, and from HQ to field staff are requirements for a successful Imagine workshop outcome. External participation is also highly recommended: peer organizations, partners, sub-contractors, and vendors can provide valuable insight. Legal agreements should be in place among all the parties so that information can flow unrestricted.

#### **Agenda**

A creative professional design thinking facilitator should be engaged by your IDEA Journey partner to ensure that more value is delivered to the nonprofit. We recommend that you clarify this with your IDEA Journey partner and insist that a creative professional facilitator manage the workshop. The agenda is a co-creation of the Imagine workshop organizers and the facilitator.

#### **Language**

For an international group, consider using translators. For audially and visually impaired participants consider providing resources to enable maximum participation. In most cases, it is recommended that notes and documentation are captured in English as follow-on

activities will most likely be conducted by individuals beyond the Imagine workshop participant group.

### **Safety**

Ensure the chosen venue provides safety procedures and more mundane information such as bathroom location, smoking policy, etc.

### **Transportation**

Individual Imagine workshop participants should organize their own travel using their normal procedures. Give people ample time to plan and obtain cost-effective travel options. Scheduling the Imagine workshop on weekends is something to take into consideration; it may reduce travel costs, but it may also require travel during personal time and additional staffing costs.

### **Visa process**

For Imagine workshop participants who require visas, early notification of date and venue is even more important. A location/venue may be chosen to minimize complications for participants who need to obtain visas.

### **Lunch/Dinner/Reception**

A dinner scheduled the night before the first day of the Imagine workshop will give the participants an opportunity to meet in a casual setting and to get to know one another, creating bonds that will have a positive effect on the outcome. It is recommended that lunches be provided on-site to minimize travel time and expense.

### **Coalition communications**

Ensure coalition attendees (individuals outside the host organization, or everyone in case of a Coalition Imagine workshop) are included in relevant Imagine workshop communications.

### **Travel template**

The logistics of bringing about 25 people at the same place and time can be eased by using the [sample travel template](#) (contributed by Winrock).

### **Welcome package**

For a best practice, access and download the sample [welcome package](#) (contributed by SOS Children's Villages) from their Imagine workshop in April 2019.

**Workshop supplies**

Bring post-its, markers, blank Journey maps, flip charts, etc. Check with the facilitator who will have a complete list. Additionally, come with data to share, particularly to help people understand progress from the current to future state of the organization and the performance indicators that would be expected to change.

**Recording/documentation**

Don't forget to bring phones and cameras for high-quality pictures and video recordings, note taking, and summarizing tools.