

# Transportation Outreach Planner

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## Public Outreach Strategies

### Workshops and Retreats

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#### Recommended Target Groups

##### Education

College Education  
High School Diploma  
No High School Diploma

##### Language

Creole  
Other  
Spanish

##### Disability

Hearing Impaired  
Other  
Physically Challenged  
Sight Impaired

##### Income

Low Income  
Middle to Affluent

##### Vehicle Ownership

Non-vehicle Owner  
Vehicle Owner

##### Race and Ethnicity

Race and Ethnicity

**Age**  
Seniors  
Working Age Adults  
Youth

## Strategy Class

- General

## Strategy Types

- Educational

## Description

Workshops and retreats are meetings organized around a particular topic or activity with a task-oriented focus.

- Workshops: Workshops are generally used to achieve specific objectives. They can be used for training purposes or for targeted discussions. These types of meetings generally have 50 participants or less, and are often one to four hours in duration. Because they are relatively short and task-focused, workshops can be part of a larger meeting, conference or summit. <sup>1</sup>
- Retreats: Retreats differ from regular workshops in that participants usually go away to a specific location for one or several days to fully focus on the topic of discussion. Retreats are useful for conflict resolution, vision and goal setting, strengthening communication, and any complicated task-oriented discussion. These meetings are generally held in non-office settings where participants cannot be interrupted by everyday distractions. <sup>2</sup>

## Special Uses

Workshops and retreats may be used to: <sup>3</sup>

- Develop a vision, goals and objectives for future action;
- Initiate plans or projects;
- Educate participants on a particular subject;
- Facilitate conflict resolution and identify course corrections;
- Encourage team work and collaboration.

## When to Use

Workshops and retreats can be used early in a project to set goals and objectives, to brainstorm new ideas, and to explore alternative action plans. They can also be used as a mechanism for engaging the public and providing detailed information on complicated or controversial subjects. These types of meetings are useful when agencies want to establish communication with specific target groups in the community and encourage ownership of recommended solutions. <sup>4</sup>

## Cost

### **\*\* Moderate (\$1000 to \$9999)**

The cost of organizing a workshop or retreat can be moderate. Expenses may include staff time, facilitator or speaker fees, rental space, printing costs, as well as meals and refreshments. These costs can be kept to a minimum if an agency seeks free meeting space and requests a facilitator to provide services pro-bono.

Low (up to \$999)	*
Moderate (\$1,000 to \$9,999)	**
High (\$10,000 to \$50,000)	***
Very High (Above \$50,000)	****

*Disclaimer:* The cost estimates provided are intended to be a guide. Project costs will vary depending on the size and nature of the project.

## Time

## \* 1 to 3 months

A workshop or retreat can be organized in a short amount of time. Depending on the complexity of the event, the most time consuming aspects of organizing these types of meetings are identifying and inviting the participants and preparing the presentations. This can take one to three months to accomplish. However, larger events involving out of town agencies can take six months or more to organize due to scheduling issues and travel arrangements.

1 to 3 months  
6 months to a year  
Multiyear

\*  
\* \*  
\* \* \*

*Disclaimer:* The time estimates are approximations. The duration of a project may vary depending on various factors, including size and budget.

## Implementation Guidelines and Suggestions

The following serve as recommended guidelines and suggestions for implementing a workshop or a retreat: <sup>5</sup>

- **Identify the outcomes of the workshop or retreat.** Determine from the start the outcomes to be achieved and how the results will be measured. This should inform all aspects of the event, including the agenda, the format of the meeting, the visuals, the handouts, and the allotted time for the event. Without clear outcomes, participants tend to lose focus and interest.
- **Maintain the number of participants to a manageable size.** Workshops and retreats are particularly effective with small groups of people (50 or less). In a small group, participants have a greater opportunity to express their thoughts and opinions and interact with others. However, it is important to have a representative mix of participants to ensure that viewpoints are not one-sided. It is also important to be aware of any possible conflicts among participants that may need to be managed.
- **Determine if a neutral facilitator will be needed.** Workshops and retreats require skilled leadership to ensure that the assigned tasks or goals are accomplished. An experienced facilitator can keep discussions on target and allow for diverse views to be expressed. If the issues are highly controversial, a neutral facilitator should be used to oversee the discussions. This will help ensure that objectivity is not compromised.
- **Organize the event around the needs of the participants.** It is important to be mindful of the needs of the participants. Their input in determining the time, date, location, meal selection, and duration of the event will help to prevent potential conflicts or problems. This can be achieved with a short questionnaire sent out by mail or email prior to organizing the event. Requiring a deadline for responses will help to ensure that the information is returned in a timely manner.
- **Identify location for the event.** The location should comfortably accommodate all of the participants and the equipment needed for the presentations. If there will be group activities or other special displays or arrangements, organizers should ensure that the meeting location can meet those needs. Workshops can be held in conference rooms, training facilities or other meeting spaces that can accommodate the number of participants invited. Retreats should be held in a location where participants are not distracted by phone calls or every-day work related issues.
- **Create an agenda and prepare the discussion points, activities, handouts, equipment, and visual aids for the presentation.** The agenda should include the purpose of the workshop or the retreat, the name of the facilitator and any key speakers, as well as the time available for each discussion point. If special activities will be used to enhance the presentation, make sure you have the appropriate number of people for the exercise, as well as the necessary space and equipment. Determine if handouts and visual aids will be needed and when you will be using them. The more planning that is done up front, the more likely the event will run on schedule and achieve its objective.
- **Send participants a copy of the agenda a few days prior to the event so that they can prepare for the meeting.** Prior to the meeting, participants should receive information explaining why they were invited to attend, the purpose of the meeting, what the agency intends to do with the information from the meeting, and any questions or information that can help them prepare. The more participants know ahead of time regarding what to expect from the meeting and how to prepare, the more effective their participation will be. The information should be sent at least a week ahead of time.

- **Keep meeting structure flexible and casual to encourage greater participant involvement.** Although it is important to follow the agenda, the meeting structure should be casual and flexible enough to accommodate group dynamics and any changes that may be needed to facilitate discussion and achieve the desired objective.
- **Follow up after the event in order to maintain momentum and continuity.** Soon after the event, participants should receive a summary of what was achieved at the workshop or retreat. The information should outline next steps, proposed timelines, future tasks, and assignments, if any.

## RECOMMENDED TARGET DEMOGRAPHICS

Workshops and retreats can be effective tools to use in a for a comprehensive public participation effort. Although these types of meetings can be used among all demographics, the effectiveness of these types of meetings as an outreach technique depends on how accessible the meetings are to the target demographic in terms of location and time of the event. Given the duration and time commitment that must be made to attend these types of meetings, the persons that attend these functions tend to be professionals in the field, community leaders, activists, and persons with flexible schedules. In order to ensure greater participation from a broader demographic, such meetings should be scheduled during evening and weekend hours in central locations that are accessible through various modes of transportation.

## Lessons Learned/Challenges

Below are key points to keep in mind when organizing as workshop or a retreat: <sup>6</sup>

- **If the purpose of the workshop or retreat is to make a decision, it is important to limit the participants to the most important stakeholders.** The more participants that are involved in a meeting, the more difficult it becomes to manage group dynamics and team decision making. Other stakeholders may be kept informed of the process by providing copies of the minutes and information material.
- **Use a neutral skilled facilitator for a retreat.** Although agency staff may be able to facilitate a workshop, a retreat should have a neutral facilitator. If an agency decides to use in-house staff to facilitate a retreat, it is important to select someone who is not involved in the process or project being discussed. Someone outside of the agency should facilitate the meeting so that there are no perceptions of bias among participants.
- **Use group exercises and icebreakers to encourage participation and involvement.** Workshops and retreats are more effective when they are interactive and include activities that engage participants. Too much reliance on lecture style presentations can lower attention levels.
- **Avoid holding workshops directly after lunch time.** People tend to be sluggish after mealtime and less productive. It is best to schedule such meetings during morning time or late afternoon (generally after 2:00 p.m.).

## Case Studies

The following are case studies of how conferences and summits can be used to enhance public participation:

- The Idaho Transportation Department organized a statewide public involvement effort to develop the state's 30-year transportation plan. The effort included regional and statewide workshops for transportation stakeholders. The workshops engaged the participants with real-time scenario planning, town hall polling, and other techniques which encouraged dialogue among different stakeholders and the general public. Through their input, a vision for the state's long-range transportation system was developed ([http://transportationforcommunities.com/shrpc01/case\\_study/7/none](http://transportationforcommunities.com/shrpc01/case_study/7/none)).<sup>7</sup>
- In 2010, the Commonwealth of Virginia held a several retreats with transportation planners and key stakeholders as part of an effort to develop a strategic plan for multimodal transportation. Participants of the retreat developed a vision, goals, and strategies for the Strategic Plan, and created working groups that were made responsible for guiding planning process. The working groups developed "measures of success and change levers" to determine the use and influence of the multimodal transportation vision. The retreats helped to bring together key players and established the foundation for the Governor's Multimodal Strategic Plan ([http://vtrans.org/resources/Strategic\\_Plan\\_12\\_01\\_10%20FINAL.pdf](http://vtrans.org/resources/Strategic_Plan_12_01_10%20FINAL.pdf)).<sup>8</sup>

## For Further Information

**Planning a Workshop: Checklist 018:** The article provides a checklist for organizing a workshop and information on other books and articles on the subject (<http://www.entrepreneur.com/tradejournals/article/100012252.html>).<sup>9</sup>

**Planning a Workshop: Organizing and Running a Successful Event:** This website article includes recommendations for planning a workshop and provides additional tools on meeting facilitation, team decision making and icebreakers (<http://www.mindtools.com/pages/article/PlanningAWorkshop.htm>).<sup>10</sup>

**Professional Development Tools: Ice Breakers and Training Tools:** In this site, the US Department of Agriculture provides a useful on-line resource guide for icebreakers and group activities that can be used in different types of meetings ([http://snap.nal.usda.gov/nal\\_display/index.php?info\\_center=15&tax\\_level=2&tax\\_subject=275&topic\\_id=1303](http://snap.nal.usda.gov/nal_display/index.php?info_center=15&tax_level=2&tax_subject=275&topic_id=1303)).<sup>11</sup>

## Sources

<sup>1</sup> U.S. Department of Transportation, Federal Highway Administration (FHWA), "USDOT FHWA/FTA Public Involvement Techniques for Transportation Decision-Making: Conferences, Workshops, and Retreats," August 2002, FHWA, 29 March 2011 <<http://www.fhwa.dot.gov/reports/pitttd/contents.htm>>.

<sup>2</sup> FHWA, "Conferences, Workshops, and Retreats."

<sup>3</sup> Entrepreneur, "Planning a Workshop: Checklist 018," Annual 2001, Entrepreneur, 27 July 2011, <<http://www.entrepreneur.com/tradejournals/article/100012252.html>>.

<sup>4</sup> Entrepreneur, "Planning a Workshop: Checklist 018."

<sup>5</sup> FHWA, "Conferences, Workshops, and Retreats."

<sup>6</sup> Mind Tools, "Planning a Workshop: Organizing and Running a Successful Event," 27 July 2011, <<http://www.mindtools.com/pages/article/PlanningAWorkshop.htm>>.

<sup>7</sup> Transportation for Communities, "Idaho's Transportation Vision: An Inclusive Process Brings Together Stakeholders to Create a Shared Vision," 27 July 2011. <[http://transportationforcommunities.com/shrpc01/case\\_study/7/none](http://transportationforcommunities.com/shrpc01/case_study/7/none)>

<sup>8</sup> Commonwealth of Virginia, Multimodal Strategic Transportation Planning Team. "Governor's Multimodal Strategic Plan for the Commonwealth of Virginia." December 2010, Commonwealth of Virginia, 27 July 2011, <[http://vtrans.org/resources/Strategic\\_Plan\\_12\\_01\\_10%20FINAL.pdf](http://vtrans.org/resources/Strategic_Plan_12_01_10%20FINAL.pdf)>

<sup>9</sup> Entrepreneur, "Planning a Workshop: Checklist 018."

<sup>10</sup> Mind Tools, "Planning a Workshop: Organizing and Running a Successful Event."

<sup>11</sup> US Department of Agriculture (USDA), "Professional Development Tools: Ice Breakers and Training Tools." USDA, 27 July 2011, <[http://snap.nal.usda.gov/nal\\_display/index.php?info\\_center=15&tax\\_level=2&tax\\_subject=275&topic\\_id=1303](http://snap.nal.usda.gov/nal_display/index.php?info_center=15&tax_level=2&tax_subject=275&topic_id=1303)>