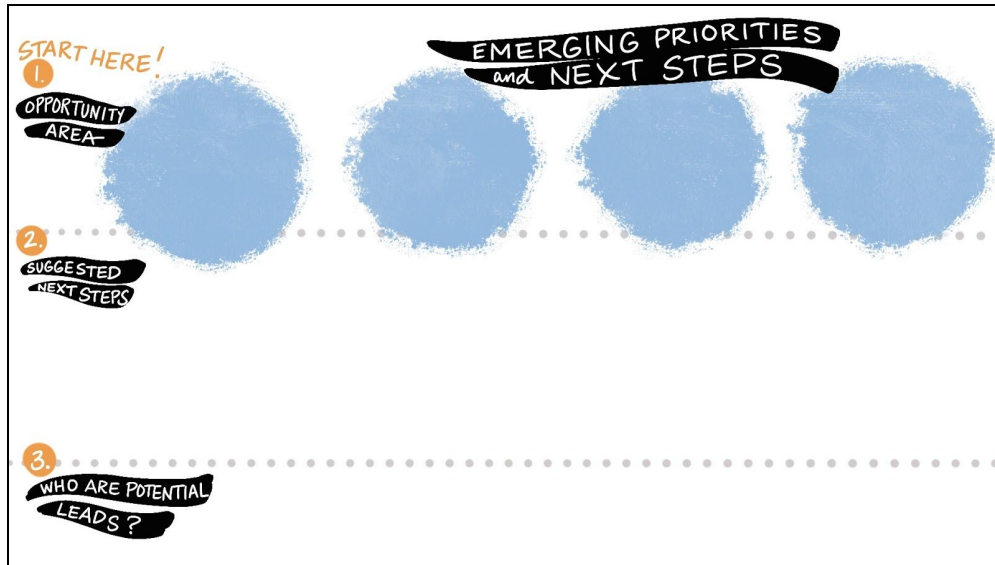


Emerging Priorities and Next Steps Template

Visual Facilitator Instructions



Time: 1-1.5 hours

Purpose:

To identify high-level opportunities, initial next steps, and potential leads for projects or initiatives

When to Use:

- During small group brainstorming, or coming together as whole group (10-12 people or less)
- Applying learning from an expert panel or dialogue
- Determining direction as a team after completing a project and looking for something new

Preparation:

Place this template on the slide as a background image on Google slides or MURAL so it doesn't move. For breakouts, duplicate the chart based on the number of breakout groups, and make sure there is a volunteer or assigned facilitator and/or recorder for each breakout group.

Step-by-Step Instructions

1. Share Purpose and Orient Group to Template and Terms

Opportunity: favorable juncture of circumstances that allow advancement or progress of an idea or initiative (stay at high altitude)

Next Steps: lower-altitude ideas about what we need to do to move opportunity forward

Leads: Who will be responsible to champion and follow through with the opportunity and next steps

2. Decide on Four Opportunities to Further Develop

The template has four opportunity areas, which serve as clusters for the group's ideas. You have the option to have groups either (1) generate four opportunity areas or (2) spend time in advance of this

template to brainstorm potential opportunities, which will lead to the identification of the top 4 ideas to bring to this process. If you decide to have group(s) brainstorm in advance, create a blank chart with the title “Opportunity Brainstorm”. Have the group generate many ideas on the chart using stickies. Cluster similar opportunities and remove duplicate ideas. Title each cluster of sticky notes as an opportunity area. By the end of this process, decide on the four priority opportunity areas to bring to this template. Option 1 will take 15-20 min, while Option 2 will take 30-45 min.

3. Identify Next Steps

With stickies, generate possible next steps for each opportunity area. (15-20 min)

4. Identify Leadership

With stickies, identify possible leads— individuals or teams for each opportunity area. (10 min)

5. Review and Refine

Take a step back and refine each area. For example, there may be next steps to add that apply to more than one opportunity area. (5min)

Tips:

- You can work through each opportunity and then identify next steps and leads (working vertically on the template) or identify next steps across the chart and then identify leads (working horizontally). Color coding the stickies helps with organization and visual relief.
- Build in time on another day for refinement and give the team an additional opportunity to confirm/come to agreement before implementing.
- Look for relationships between each opportunity area. Can some of the areas and the steps be combined?
- Regarding potential leads, are roles maximized and adequately defined for implementation?
- Use this document as a check-in tool at the beginning of team meetings to make sure everyone stays on track.

Sample Completed Template

