

How to facilitate a session

A guide to running a planning session that fills the Action & Sustainability Canvas and turns it into two short, owned plans.

Action & Sustainability Plans

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1 Prepare

- Invite your core team plus one or two partners who will own parts of the plan (about 4–10 people).
- Set aside two hours, and bring your earlier notes, ideas and any diagnosis to hand.
- Print the canvas at A3, or open it on a shared board.
- Decide who facilitates and who will write up the final plans afterwards.

2 Run the session

- 10 MIN** Recap — where the group is, and which ideas you are planning from.
- 20 MIN** Focus, objectives & target groups — agree the top of the canvas together.
- 30 MIN** Activities — for each one, name an owner, a timeframe and what it needs.
- 20 MIN** Outcomes & ethics — what will change, and how you protect participants.
- 25 MIN** Continuity — which solutions last, who sustains them, and what institutional support you need.
- 15 MIN** Risks & indicators — the main risks, and 2–3 measurable signs of success.
- 10 MIN** Wrap-up — confirm owners and set a date to review progress.

3 Follow up

- Write the canvas up as a short Action Plan and a short Sustainability Plan.
- Share both with everyone named in them, and confirm each owner agrees.
- Put the review date and the indicators somewhere the team will see them.
- Revisit the plans as the work evolves — treat them as living documents.

4 Running it online

- Fill the canvas live on a shared board so owners can see their own commitments.
- Use a spreadsheet for activities and indicators, so they are easy to track later.
- Keep the session to about 90 minutes online, with a short break.
- Prefer privacy-respecting, GDPR-compliant tools, and give everyone edit access.