Provided below is a sample agenda that can be used to facilitate a small group action planning session. It is recommended to narrow the scope of the discussion by identifying a focus area prior to the session. Two options for identifying focus areas is to simply select the focus area based on organizational knowledge of Institute/Center (IC) priorities or to poll the session participants in advance to gauge where their interest and energy may be.

If you have a large group, it may be beneficial to break out into small groups of 5-7 participants and have each group identify root causes and brainstorm solutions around one survey item. Each small group should have their own facilitator to help guide and support the discussion. At the end of the breakout session, have each small group report back to the large group and share top root causes and top potential solutions from the quick wins and strategic improvements.

1. **Welcome and Introductions (10 minutes)**
   1. Executive champion delivers opening remarks to kick-off the session
   2. Allow the participants to introduce themselves
   3. Icebreaker: *“How do you define employee engagement?”*
2. **Review IC goals, session objectives and approach (5 minutes)**
   1. Review the session agenda and expected outcomes
   2. Establish ground rules for the session
3. **Review IC survey results (10 minutes)**
   1. Provide an overview of the previously determined focus area and related survey items
   2. Ask the group to select 2-3 specific survey items within the focus area to conduct action planning during the session
   3. Select 2-3 survey items of most interest to participants
4. **Identify root causes and brainstorm solutions (60 minutes)**
   1. Identify root causes – For each selected survey item, lead a discussion about their personal views on employee satisfaction and reflections on the data
      1. Based on your experience, what might be a cause behind reported low satisfaction for this survey item?
      2. Do your experiences match what the data portrays?
      3. What insights can you bring to these numbers?
      4. What challenges have you observed in this area?
   2. Brainstorm solutions
      1. What are some quick wins that can be easily implemented within your IC in the next 6-12 months?
      2. What are some strategic improvements that can be implemented across the IC in the next 1-2 years?
   3. Select solutions to propose to leadership
      1. Help the group discuss and vote on their top three quick wins and top three strategic improvements to include in the action plan
5. **Next steps (10 minutes)**
   1. Discuss how solutions will be proposed to leadership. Consider assigning action leads to present ideas to leadership and to serve as action points of contact if it is desired to keep session participants involved in the implementation of actions.
   2. Solicit feedback from session participants on what they enjoyed about the session and what could be improved.