Preparing an online visioning process

Ahead of time

If you have decided to hold your visioning process online, start by agreeing dates and timings. Next choose what platform you will use to hold the online meetings (eg Zoom, Teams or Meet.Coop). Ensure the person doing tech support has access and can create the online events and share the links with your team and participants.

Decide how people will indicate they are attending and any accessibility needs - by email? An online form? Or you could use a free online ticketing system.

Send out your invitations with the following details:

- What you are inviting people to (use the text in this document if it helps)
- Date and time sessions
- That it’s free or pay-what-you-can to take part
- How to sign up and if there is a deadline (or send the link to join the sessions if you decide not to have a sign up method)
- Can you add a link to more information/support on using Zoom or the alternative platform you’ve chosen?
- Explaining that you will be recording the session, if you have decided to.

Plan to send out the links to join the call to participants ahead of time, and follow up with a last minute reminder a day or two beforehand.

The team running the exercise should run through it in detail beforehand. Note where you would like to share information in chat and where you need breakout rooms. Set up an online shared document for notes. It can be helpful to create a document with all the links and messages you

know in advance you will want to share in one place .

On the day

The team running the exercise should arrive early, settle in and go over any last minute questions. You could open the call a little early for anyone who wants to check they can log in or who wants a bit of extra support. Indicate who can give tech support if people have problems or questions about how to use the platform.

Invite everyone to rename themselves as they join with their name, the pronouns they choose to use and if relevant, the group they are part of. Now you are ready to get started.

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