

Roles/Facilitation

Whether you are running your visioning exercise online or in person, it's good to have a small team of people involved in preparing and on the day. Aim to have one or more people in each of these roles:

Facilitation: It is vital to have at least one person to facilitate and lead the process, using this guide. You could have extra facilitators, if you have capacity, who could run different aspects of the session. You will need to familiarise yourself with the activity beforehand, but it's a reasonably easy exercise to facilitate.

Practical support: For an in person meeting, this involves looking after the venue, refreshments and welcoming participants. They can also help with small groups and ensuring everyone has paper for notes or anything else they need to take part. Online, you want someone to keep an eye on the technical aspects of your meeting - admitting participants, setting up breakout rooms, putting information in the chat and helping participants who have any issues with the platform.

Note taker/harvester: This is someone who would be responsible for capturing notes and also sorting responses into themes at certain points in the process.

It's good for the whole team to meet and go through the process thoroughly together in advance, to be clear who is doing what on the day.

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