



Futures Forum Toolkit



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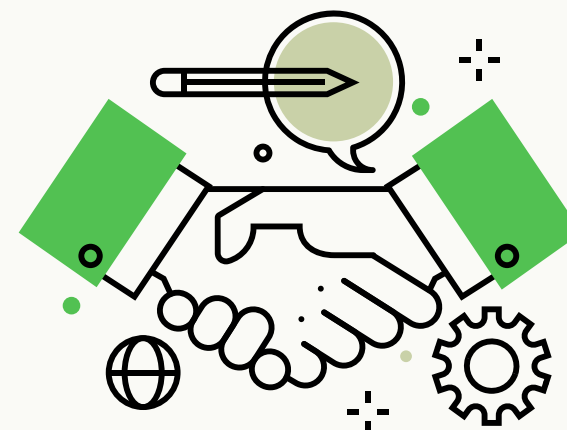


Introduction

Designing spaces for meaningful engagement across sectors, especially between researchers and policy communities, is crucial yet challenging. On any given day, stakeholders from different institutions and domains may struggle with language barriers, uncertainties, and varying comfort levels when engaging with others. Recognising these diverse needs is essential for effective event design. Furthermore, efficient knowledge exchange events often occur under significant time and resource pressures. To address these challenges, we developed a flexible and reusable knowledge exchange event format: **the Futures Forum**.

The Futures Forum was initially piloted in 2023 by the UCL's Policy Impact Unit. We wanted to explore the effectiveness of flexible, future-looking event formats in fostering deeper, open, and inclusive engagement between university, policy, and other stakeholders. After several iterations of applying the methodology to various policy issues, we believe the Futures Forum methodology has the potential to benefit a wider audience and facilitate **knowledge exchange and relationship building**. This toolkit aims to introduce readers to the Futures Forum methodology and provide detailed guidance, materials and practical suggestions for organising an impactful Futures Forum event.

'Futures' covers a wide range of methodologies for identifying long-term issues and challenges shaping the future development of a policy area and exploring their implications for policy development. It provides a set of research and analysis tools that policy actors can use to support development of policy that is resilient to a range of possible outcomes.



What is a Futures Forum?

The Futures Forum is an event-organising methodology that uses futures thinking to guide participants through a joint exploration of futures of a particular policy topic or issue. It provides a space for participants to break from the pressures of short-term thinking and instead explore longer term “**what if**” and “**so what**” questions with others. The Futures Forum methodology both supports and benefits from a diverse mix of participants, perspectives and experiences. Through a sequence of interactive activities, participants engage in anticipating a range of possible and plausible futures, allowing them to consider cascading influences and empathise with future stakeholder groups impacted.

Imagining futures can shift the power dynamics that arise from differential expertise among participants. Since the uncertainty of futures means no one individual can be a definitive expert on what will happen, all participants are levelled to equal legitimacy for contribution. This deliberately disrupts influential narratives that force people into certain fixed roles, such as those that restrict academic-policy engagement to a producer-user model, and helps address other biases surrounding title, seniority, field of study, and more.

In addition, the Futures Forum methodology extends a participant’s understanding of a policy issue by considering a breadth of possible future directions of political, economic, social, technological, legislative, and environmental trends. Participants may deepen their **awareness of the language, framing and culture shaping policy issues** across different fields and sectors, as well as improve their understanding of how evidence fits into policy and its impacts.

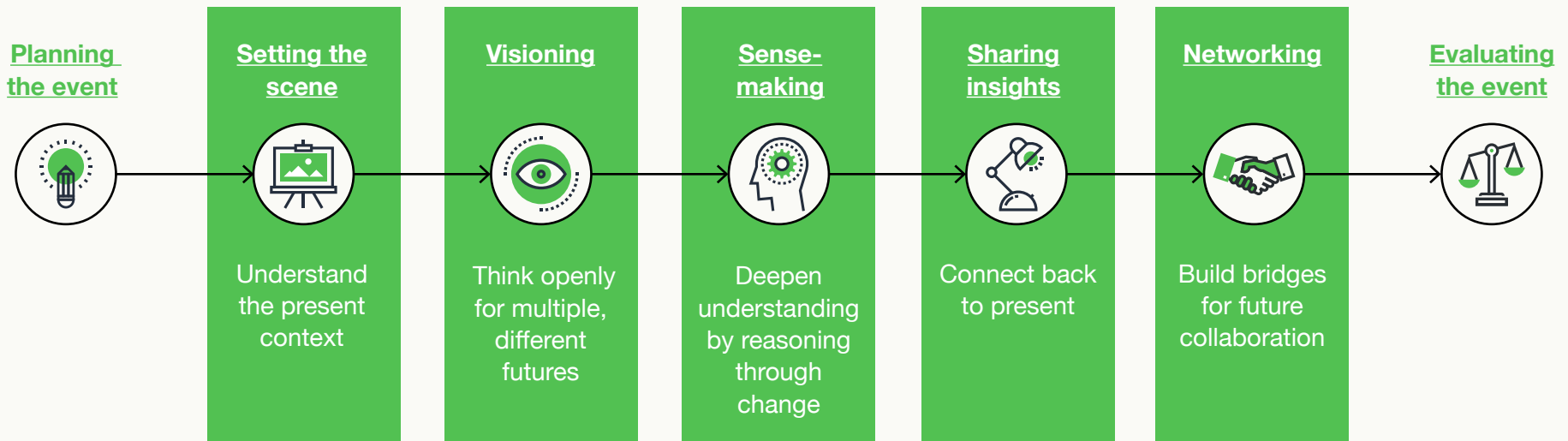
“The diversity in participants was one of the best things – I gained new perspectives and the knowledge exchange has been so valuable and a highlight for me. Also, the conversations we had and hopefully will continue to have, were a highlight and something I personally hadn’t experienced before.”

Researcher attendee,
Futures Forum on Health Inequalities

Structure of a Futures Forum

There is no 'right' way to embed futures thinking in knowledge exchange. The suggested structure of a Futures Forum is delivered in five modules over the course of a few hours. The modules can be adjusted or skipped depending on the context, and are designed to be delivered with facilitation skills that do not require expertise in futures thinking.

The Futures Forum methodology is adaptable to different event objectives and organising contexts, allowing room to customise the content and activities within each module. After the event is over, it is recommended to summarise the event discussions or produce other outputs that can give visibility, validation, and recognition to the effort of participants.



How do I use this toolkit?

This toolkit was written with the potential Futures Forum organiser in mind. Potential organisers may come from any subject domain and job role, so long as they have a commitment to strengthen engagement and knowledge exchange between communities. The toolkit outlines a few roles that an organiser might require to deliver a Futures Forum event, followed by explanations of several key activities, including their respective purpose and methodology notes. A summary activity list is provided at the end to illustrate the end-to-end process. We recommend that organisers focus on understanding the purpose behind each activity, as the details may be tailored to each Futures Forum's specific context (stakeholders, timeline, resources, etc.).

In addition, this toolkit is accompanied by an editable “Supplementary Artefacts” document, which organisers may download from the Policy Impact Unit's website (<https://www.ucl.ac.uk/steapp/collaborate/policy-impact-unit/innovating-engagement/futures-forum>) and use or repurpose as needed. The shaded text in this toolkit denotes sample artefacts that are available in the supplementary artefacts document. The supporting artefacts should be viewed as examples rather than requirements, intended to inspire rather than limit.



Getting started

Assigning roles and responsibilities

An end-to-end delivery of a Futures Forum involves a few key roles, listed in the table adjacent. The roles beyond organiser and facilitator depend on the organiser's needs and may help expedite certain portions of event organising. For example, organisers without existing relationships to the policy community might benefit from having a policy partner to help with securing certain policy stakeholders' attendance. A single person may also occupy multiple roles, depending on their capacity and institutional affiliation. For example, the research partner could also be the organiser.

Role	Responsibilities
Organiser (essential)	<p>This role is accountable for overall project management and event delivery. A Chair or room facilitator manages overall facilitation of the room, such as managing transitions through each session, and several table facilitators are each assigned to a breakout group to facilitate group discussion. The organiser will also need to determine the owners for the post-event work, e.g. producing and disseminating the event output.</p> <p>There are no requirements for the organiser's professional background or job role. They may be members from the policy community, research community, knowledge brokers, or other. Prior event organising experience is beneficial though not strictly required if the organiser has enough lead time and support. The organiser typically assembles a team to help with event delivery.</p>
Facilitator(s) (essential)	<p>Facilitator(s) play a substantial role in delivering the Futures Forum event on the event day. A Chair or room facilitator manages overall facilitation of the room, along with several table facilitators who are each assigned to a breakout group. The total number of facilitators will depend on the number of event participants and breakout groups.</p> <p>We recommend the Chair or room facilitator have prior group facilitation experience, as they may also be involved in co-developing the facilitation plan with the organiser. For table facilitators, prior group facilitation experience is beneficial but not required, and they may leverage the facilitation cheat sheet.</p>



Role	Responsibilities
Funder (if required)	<p>Some events may require a funding source for event expenses, depending on factors such as organiser budget and desired scale of the event. Common expenses to consider include, but are not limited to, venue hire, catering, and technical equipment hire.</p> <p>The organiser may need to account for different funders’ expectations for the objectives and output of the event, as well as their degree of involvement in the planning process.</p>
Policy, research, or other community partner (if required)	<p>This role may be beneficial for organisers seeking a stronger connection into certain communities or stakeholder groups, whether that’s policy, research, or other potential participants.</p> <p>This role partners with the organiser to provide their community’s lens for key event decisions, such as communicating their objectives and incentives and identifying potential participants. While the partner does not necessarily have to have deep knowledge in the event topic themselves, they should have a strong grasp of the landscape – important institutions, experts, ongoing debates, etc. Depending on the organiser’s needs, the partner may be responsible for contacting and inviting certain participants. For example, a policy partner may be better suited than the organiser to contact high-level government officials.</p> <p>The expected time commitment will scale with their scope. No prior event organising experience is required.</p>

Planning the event



Defining objectives

The event objectives serve as a compass for event design and delivery. The objectives should directly answer questions such as: Why are we doing this? What are we hoping to achieve? What needs to happen for the event to be considered impactful?

In addition to broad objectives surrounding (1) knowledge exchange and (2) relationship & network building, event objectives should be set according to specific topics, stakeholders, or the context in which the event takes place. These may be further iterated upon as planning progresses.

Example objectives from past Futures Forums include:

- Support both researchers and policymakers working on related issues to build their networks across policy/academia.

- Support researchers in developing their understanding of areas of potential future impact from their current or future research.
 - Support researchers in developing their competencies for engaging with policy actors for a range of contexts.
 - Provide policymakers with a structured opportunity to think with curiosity, creativity, and anticipation about issues where their focus might typically be short-term in nature.
 - Share research and new tools developed by the co-organising research institution.
 - Ensure the selected Futures Forum topic remains a priority on policymakers' agendas.
 - Create opportunities for early career researchers to engage with policy actors.
- The following illustrates how objectives may guide event design and practical implementation:

Example objective	Possible design decisions	Possible implementation considerations
Create opportunities for early career researchers to engage with policy actors	<ul style="list-style-type: none"> • Ensure that early career researchers make up at least 50% of researcher attendees • Build in sessions for both formal dialogue and informal networking • Set up posters showcasing early career researchers' work 	<ul style="list-style-type: none"> • Schedule the event with researcher availability in mind, e.g. avoid clashes with important academic conferences • Gain commitment from enough policy actors to stay for the networking session • Send invitations to researchers early enough for them to prepare presentations

Mapping stakeholders

Stakeholder mapping is a foundational exercise for any Futures Forum event. Stakeholders consist of both the people who will provide the grounding evidence for the event as well as the attendees who will benefit from and contribute to cross-sector collaboration long after the event.

This exercise is guided by the event objectives. An event that seeks to build relationships with industry leaders, for example, might choose to map industry practitioners according to their job level or how active they are at major industry conferences. Stakeholder mapping is also often an iterative process. For instance, a confirmed speaker might reveal a new angle of the event topic that the organisers had not previously considered. This new discovery might feed back into identifying additional participants or refining the event objectives.

Championing Equality, Diversity & Inclusion

As an engagement format aimed at building sustained relationships, each Futures Forum's impact extends well beyond the end of the event. Through this stakeholder mapping exercise, organisers play a significant role in handpicking and empowering future changemakers. We invite organisers to challenge biases (especially similarity bias) and centre Equality, Diversity & Inclusion (EDI) principles to strengthen the diversity of perspectives and support opportunities for all. EDI training is often available through workplace resources or may be contracted through external suppliers.

2. Develop key criteria for identifying relevant individuals and evaluating potential participant mix. The defined event objectives guide the criteria development.



	A	B	C	D	E	F	G	H	I	J	K	
1	Info							Thematic criteria				
2	Source	Organisation	Title	Name	Role	Contact	Based (Country)	Sustainability	Public Perceptions	Other relevant theme	Pandemic preparedness	
3	By reference	World Health Organization	Dr	Jane Doe	Head of Vaccine Research		Switzerland			1	1	

Persona 1 - policymaker Persona 2 - academia Persona 3 - industry +

1. Identify the key persona (or stakeholder group) and level of granularity, e.g. for certain Futures Forums, other personas like "charity" might be more relevant.



3. While the organiser and partners' existing networks may provide a ready source of contacts, we encourage sourcing individuals using additional channels, such as expert databases.



Preparing evidence cards

Evidence cards are an optional facilitation prompt used in the Visioning, Sense-making and Sharing Insights event modules (see next section). The purpose of the evidence cards is threefold:

- (1) to share knowledge around key trends,
- (2) to prompt reflection and shift thinking towards *anticipation* rather than prediction,
- (3) to serve as informal conversation starters.

So long as these purposes are met, the specific content, format, quantity, and source of evidence cards are open to innovation. Similarly, organisers who may be executing on tighter timelines, or who find that other components of the event have filled these functions, may decide to forgo the use of evidence cards altogether.

Evidence cards might present information about current research on the topic or about broader issues, as determined by the event scope and objectives. They typically include a short title, short description, image, and reference where available.

Wearable devices and consumer health

The ubiquity and diversity of wearable products has been steadily increasing, and there are now even forms of smart clothing and smart shoes. Smart watches, fitness trackers, and smart glasses are becoming increasingly common. These devices can monitor a wide range of health metrics, including heart rate, sleep patterns, and even mental health. They can also collect vast amounts of data, which can be used to improve healthcare and public health interventions.

While an ageing population is a major driver behind the growth of wearable devices, there is also a growing interest in younger people to be more health conscious. In 2019, the UK saw a 15% increase in sales of wearable devices, and this is expected to continue through 2022. As a result, the health and fitness industry has seen a significant boost in revenue.

There is a debate around whether these products are truly beneficial or if they are just a distraction. Some argue that they can help people to monitor their health and make better choices. Others worry that they can lead to a reliance on technology and a loss of personal responsibility. It is clear that as these devices become more widespread, it will be important to consider the implications for privacy, security, and data ownership.

Connected wearable devices

Year	Connected wearable devices (in millions)
2019	1.2
2020	1.4
2021	1.6
2022	1.8

The Futures Forum on Health Inequalities produced an assortment of trend cards and research cards sourced from researcher submissions. The event benefitted from early academic buy-in through this activity.

GLOBAL PREPAREDNESS

Imagine a world where every country, regardless of size or wealth, has equitable access to vaccines for the next pandemic.

Does this future prompt you to think about a different *hope* for pandemic preparedness?

The Futures Forum on Pandemic Preparedness produced an assortment of Equity cards to prompt thinking about alternative futures.

Construction now responsible for 73% of U.K.'s waste as sector stagnates in efforts to go green - as other industries race ahead.

Waste data published this week by the Government paints a grim picture for the construction sector as their lack of progress in tackling waste, combined with the successful green transition of other sectors such as textiles and food, means construction now accounts for nearly three quarters of waste in the UK - up from c.62% in 2016. We ask today why construction is the sector that just can't get it right, on green transition.

Circular Cities

Plans have been unveiled for first three new 'Circular Cities' which will be designed for deconstruction, use eco-principles to prevent over-design, and be deliberately crafted to improve energy efficiency and reduce emissions.

The Cities will be delivered up to three years more quickly than those built with traditional construction methods, and be approximately 20% cheaper to build - largely due to the availability of quality-assured secondary materials and efficient use of waste streams which will reduce reliance on raw materials.

The Futures Forum on the Circular Economy for Construction produced a range of hypothetical news headlines from the future


Want to see these cards in detail?

Find them and other examples on our webpage (<https://www.ucl.ac.uk/steapp/collaborate/policy-impact-unit/innovating-engagement/futures-forum>)



Delivering the event



Using 5 facilitation modules





Facilitation plans can be developed from the methodology notes below for each module.

Module	Purpose	Methodology Notes
<p>1</p> <p>Setting the scene</p> 	<p>The aim is to give participants some common reference points for understanding the ways that different communities are exploring the potential futures of the event topic.</p> <p>The Chair and speakers may also help clarify some of the participants' questions about current and emerging policy and research trends.</p> <p>The speakers will also help seed the subsequent table discussions by sharing their personal responses to their Hopes and Fears on the topic.</p>	<p>Typical duration: 30 min</p> <p>Common format: Panel presentation</p> <ol style="list-style-type: none"> [5min] Welcome from event chair and brief introduction to panellists. Address the aims of the Futures Forum methodology and specific event. [15min] 3-4 speakers give participants insight into current issues and trends that they or their team are working on in relation to the topic. Speakers can reflect on: <ul style="list-style-type: none"> Hope – something they hope to see in the future of this topic, or that makes them hopeful. Fear – something that concerns them, or that makes them feel fear. Trends – 3 emerging trends they see shaping the Future of the topic. [5 min] Audience Q&A [5 min] The Chair may provide a short primer with principles for how to engage collectively in futures thinking. Explain to participants that: <ul style="list-style-type: none"> The future is open. It is not fixed, it keeps changing, and cannot be predicted. So, think differently from today's status quo. The future is multiple. There are countless possibilities. So, think how your insights can connect in different ways with those of others. The future is uncertain. Different knowledges about the future lead to different actions. So, think about which uncertainties you want fellow participants to take forward. The future is differentiated. Different groups will be impacted in different ways. So, think with empathy about whose voices might not yet have been considered.



Module	Purpose	Methodology Notes
<p>2</p> <p>Visioning</p> 	<p>The conversation shifts from plenary to a more intimate setting on tables to give better space for active participation by all participants. Participants each reflect on their Hopes for the future of the topic.</p> <p>The objective is to have participants detach from the present, immerse themselves into futures, imagine what kinds of experiences, events, behaviours relate to the future of the topic, think aspirational in terms of what they would like to see changed and unchanged, and exchange narratives.</p> <p>There are no major restrictions on how these conversations unfold. We believe, however, that openness and flexibility is conducive to more inclusive discussion, and better suits the contingent nature of the participants, the topic and context.</p>	<p>Typical duration: 20 min</p> <p>Common format: Table-based discussion, recommended maximum 10 per table</p>  <ol style="list-style-type: none"> Chair introduces the structure of next two activities (Visioning and Sense-making) and how the groups will engage back in plenary thereafter. Each group will have a facilitator and notetaker (the facilitator may also serve this role) to record discussion points for the “Sharing insights” module and to feed into an event output. Participants, with help of a table facilitator, take a few minutes to reflect on their Hopes for the Future of the topic and capture these on blank cards (recommended: A5 size or large post-its). They share in turn with the group. They will be encouraged to use any approach that feels comfortable to them: words, sketches, pictures, talking, etc. <ul style="list-style-type: none"> <i>Potential prompts:</i> <ul style="list-style-type: none"> • What are our hopes about the future of X? • Think about different groups (families, households, government, universities, local businesses, large businesses, communities, etc). How do you hope their life will be impacted by the future of X? • How do you hope your own life will benefit? Table facilitator gives everyone time to share their hopes. Collect the cards in the centre of table to make these Hopes visible. <ul style="list-style-type: none"> <i>Additional ideas:</i> <ul style="list-style-type: none"> • Large A0 sheets could serve as table ‘canvas’ to allow people to capture other aspects of their hopes and visions. <p><i>End state: a set of Hopes that have been shared.</i></p>

Module	Purpose	Methodology Notes
<p>3 Sense-making</p> 	<p>The aim now is to move the group from visioning into problem-framing or challenge-setting. This can be prompted with reflections on participants' fears, concerns, perceived challenges, potential harms, etc. Participants will explore futures to identify significant uncertainties or ideas for development.</p> <p>There are two parts to this module:</p> <p>A. Identify what areas the group wants to focus their discussions on. Start with individual thoughts and translate them into "How can we..." challenge statements.</p> <p>B. With those challenge statements, discuss the research, knowledge and evidence challenges to achieving them.</p>	<p>Typical duration: 40 min</p> <p>Common format: tabled-based discussion (continued from "Visioning")</p> <p>1. Table facilitator prompts group to reflect on Fears for the Future of event topic and capture these on blank cards. This can be through a lens of potential harms or challenges, e.g.:</p> <p><i>Potential prompts:</i></p> <ul style="list-style-type: none"> • What is the problem we face? What issues are creating pressures? What different types of harm might be done? Who might experience those harms with what consequences? • Do any of the evidence cards on the table prompt you to think about something you hadn't before yet? What trends are you most worried about in terms of the event topic? • Where have you observed positive or negative outcomes? <p>2. Participants are encouraged to reframe their thoughts as 'How can we...' challenge statements on blank cards (recommended: A5 size). Challenges should be as short as possible and no longer than 4 lines long. Table facilitator prompts sharing of 'How can we...' statements and may occasionally need to narrow down the number of challenge statements for discussion, e.g. via participant sorting or voting.</p> <p><i>Potential prompts:</i></p> <ul style="list-style-type: none"> • Can we articulate the challenges we want to address as actionable 'How can we...' statements? • Say you had a crystal ball to see into the future. What is one thing you would change? <p>3. For the selected challenge statement(s), the facilitator further prompts for convergent or divergent research, evidence, etc. They may refer to the evidence cards on the table. There should be blank evidence cards for participants to add references or sources.</p> <p><i>Potential prompts:</i></p> <ul style="list-style-type: none"> • What do we know in terms of the evidence bases? • What don't we know? What research needs to be done? <p><i>End state: a selected 'How can we ...' statement to feed back to the room.</i></p> 

Module	Purpose	Methodology Notes
<p>4 Sharing insights</p> 	<p>The aim of this module is to provide a semi-structured process to reconvene into a closing plenary and share key reflections from each table – a significant challenge identified, and/or what knowledge gap was striking.</p>	<p>Typical duration: 20min </p> <ol style="list-style-type: none"> 1. Each table is invited to share a significant ‘How can we ...’ challenge statement discussed and what key pieces of evidence were shared, and/or evidence gaps were identified. 2. Organiser, Chair, or other appropriate person closes the formal sessions of the agenda. Next steps, uses of outputs, and potential dissemination plans are shared. 3. Optionally, “Setting the scene” speakers may reflect with closing thoughts on: <ul style="list-style-type: none"> • Challenges, policy gaps and evidence gaps discussed in the breakout groups, and/or • “If you were to summarise one hopeful news headline and one fearful headline for 10 years from now, what would these be?”
<p>5 Networking</p> 	<p>The aim is to provide an informal setting for participants to further engage, discuss, learn and build relationships.</p>	<p>Typical duration: 45 min </p> <p>There is provision of space for participants to continue discussions, potentially with refreshments and/or a meal.</p> <p><i>Additional ideas:</i></p> <ul style="list-style-type: none"> • Place evidence cards, posters, etc. around the networking area • The Futures Forum on Pandemic Preparedness included a laboratory tour

Evaluating the event



Producing and disseminating the event output

A tangible event output gives event attendees a visible and shared product. The specific format may vary – the Futures Forum on Health Inequalities published a workshop report on the UCL website (<https://www.ucl.ac.uk/healthcare-engineering/news/2023/nov/report-futures-forum-health-inequalities>), while the Futures Forum on the Circular Economy for Construction used the insight gained at the event to inform policy briefings. Organisers should agree on roles, responsibilities, processes, and dissemination and communication plans in the event planning stages.

Collecting participant feedback

Participant feedback serves to (1) give organisers an indication of whether the event objectives were met, (2) help organisers identify future opportunities, and (3) learn

what works better for engagement of different groups, on different topics in different contexts. In addition, certain funders may also have specific impact evaluation requirements that organisers need to fulfil.

Typically, the biggest challenge for impact evaluation is feedback participation rate. We recommend organisers allocate planning time to discuss the appropriate time and location for requesting feedback. For example, collecting participant feedback during the event day while participants are present and engaged might be effective, e.g. projecting a QR code for an online survey on the screen before participants break into informal networking. Or, including the call-to-action to provide feedback in an email that shares out the event report may be effective.

Surveys are a common method of collecting participant feedback. Another example organisers might consider is setting up a one-question Net Promoter Score survey (“On a scale from 0 to 10, how likely are you to recommend this event to a colleague?”).

Organisers who would like to measure pre-post changes may also consider including a short survey before the event, for example at the participants’ time of event registration.

Evaluating the ‘relationship building’ objective may require methods beyond surveys. Semi-structured interviews several months after the event can help organisers (or the policy and research partners, if interested) gather further insight. Potential questions for the interview include:

1. Have you connected with any (research/policy) attendees since the end of the workshop? Why or why not?
2. Have elements of the workshop, e.g. evidence gaps, fears & harms, etc. affected the way you approach your work?
3. Do you feel better equipped to engage researchers/policy actors following the event? Why?
4. To whom would you recommend this event? Why?

Conducting team debriefing

A team **debriefing** or retrospective gives organisers the space to reflect on what went well, what fell short, and opportunities for change. The scope of the debriefing may include any facet of the event, e.g. the content of the event, the objective setting process, logistics, etc. An impactful debriefing allows participants to distil key learnings in service of future improvements.

Like the Futures Forum modules, this requires a facilitator and employs participatory methods. Various debriefing guides are available online, though they typically follow a similar structure over the course of at least 1 hour. Larger teams or debriefings that seek participation from a wider set of stakeholders may need to be conducted over a longer session with a scheduled break in between.



Example template on Miro. Credit: Dave Westgarth

Illustrative activity list

The following activity list may serve as a starting template for organisers to develop a planning checklist. Note that the actual timeline will depend on the specific knowledge exchange contexts in which the event is being organised and taking place.

No.	Activity	Parties involved	Suggested timeline relative to event day	Description / Notes
1	Defining objectives	Organiser, community partner(s)	At least 12 weeks prior	Discussions regarding the objectives of this effort. The objectives should answer questions such as: “why are we doing this?”, “what are we hoping to achieve?”, “what needs to happen for the event to be considered impactful?”
2	Event scoping	Organiser, community partner(s)	At least 12 weeks prior	Discussions regarding the scope of the event, boundaries and level of depth of the topic. This can be an iterative process and involve input from more stakeholders.
3	Stakeholder mapping	Organiser, community partner(s)	At least 12 weeks prior	Identify individuals from key stakeholder groups (policy, research, others) to invite as participants.
4	Confirm external vendors and required lead times, e.g. venue, technical equipment, catering, printing	Organiser	At least 12 weeks prior	When confirming venue capacity, be sure to factor in the number of organisers and support staff as well. Some venues may also have specific requirements on lead times, such as placing a provisional order a few weeks before the final order.

No.	Activity	Parties involved	Suggested timeline relative to event day	Description / Notes
5	Discuss agenda	Organiser, community partner(s)	12 weeks prior	<p>Start discussions and set the initial shape of the agenda for the day, including start and end times, module formats, etc.</p> <p>This may be adjusted as facilitation plans further evolve and as participants confirm attendance.</p>
6	Determine plan for evidence cards	Organiser, community partner(s)	12 weeks prior	<p>Determine who will be supplying content for the evidence cards, when the content needs to be finalised, what the evidence cards should look like, who will be making the evidence cards, and who will manage correspondence.</p> <p>Note that some plans call for longer lead times, e.g. submissions from a broad set of researchers might need a few weeks to collate.</p>
7	Invite speakers for “Setting the scene” module	Organiser, community partner(s)	12 weeks prior	<p>Identify research and policy (and/or other) stakeholders to speak at the “Setting the Scene” module and agree on who will issue invitations and manage correspondence.</p> <p>Speakers should focus their talk on how their respective sectors are exploring the future of the event topic.</p>
8	Set up event page and send invitations	Organiser	10 weeks prior	<p>Set up event page with relevant details for attendee RSVP. Agree on who will issue invitations if direct outreach is needed.</p> <p>Collect information on 1) role & institution, 2) Dietary and accessibility requirements, 3) any other relevant questions</p>
9	Discuss facilitation plan	Organiser, facilitator(s)	10 weeks prior	<p>Discuss facilitation plans for each module, identify facilitators, and set aside time for facilitator training.</p>
10	Start designing supporting materials	Organiser	8 weeks prior	<p>Start designing the template for evidence cards and other supporting materials.</p>

No.	Activity	Parties involved	Suggested timeline relative to event day	Description / Notes
11	Confirm and brief speakers	Organiser, speakers	6 weeks prior	Briefing meeting with confirmed speakers on the objective of the event and the purpose of the “Setting the Scene” module. Discuss speaker format, slides, talking points to prepare, and any other requests for the speakers.
12	Discuss evaluation plan and event output	Organiser, community partner(s)	5 weeks prior	Start discussions regarding how to collect feedback and evaluate impact for the event. Determine the target format of the event output and assign responsibilities, e.g. if it’s a summary report, who holds the pen and what will they need.
13	Send out reminders to RSVP	Organiser, community partner(s)	4 weeks prior	Another round of invitations might be necessary if RSVPs are unbalanced or otherwise jeopardize the event objectives, e.g. if most confirmed attendees come from the same organisation
14	Finalise speaker slides and other presentation materials	Organiser, speakers	3 weeks prior	Also update the event page with additional information.
15	Finalise supporting materials, e.g. evidence cards, prompt cards	Organiser	3 weeks prior	
16	Facilitation run-through	Organiser, facilitator(s)	2 weeks prior	Identify gaps or questions in the facilitation plan. Facilitators should be provided with or briefed on the event objectives, the “Setting the scene” presentation and other supporting materials.
17	Produce evaluation materials, e.g. post-event survey	Organiser	2 weeks prior	

No.	Activity	Parties involved	Suggested timeline relative to event day	Description / Notes
18	Confirm all event attendees	Organiser	2 weeks prior	All participants, organisers, facilitators and other personnel should be accounted for. Send reminder e-mail to any high-level or high-priority attendees.
19	Procure event supplies and send materials to print	Organiser	2 weeks prior	Event supplies to procure may include flipcharts, pens, and other materials identified while shaping the agenda.
20	Send e-mail with dietary restrictions and final number of participants to venue	Organiser	At least 1 week prior	Determine timeline according to venue requirements.
21	Finalise facilitation plan and re-align on outcomes	Organiser, facilitator(s), community partner(s)	1 week prior	Review list of event objectives for any adjustments and how they should be reflected in the event.
22	Event run-through	Organiser, facilitator(s), other support staff	1 week prior	Conduct a run of show or rehearsal of how the day will flow, e.g. who will be conducting each process at what time and where, to ensure clear responsibilities and smooth transitions. This may also help identify any last-minute staffing gaps or printing needs.
23	Send reminder e-mail to confirmed participants	Organiser	A few days prior	Send e-mail to participants with instructions for arrival, agenda, and other event details as necessary.

Deliver event				
24	Take notes and gather all insights and evidence produced	Organiser, facilitator(s)	On the day	Ensure all discussion notes are captured and collected, to feed into event output and for team debriefing.
25	Collect participant feedback	Organiser, other support staff	On the day	We recommend asking participants to provide feedback through a low-effort method, e.g. short surveys, after the formal modules have wrapped.
26	Produce and circulate event output	Organiser, and others as previously determined	As previously determined	The event output should be circulated with all event participants at the minimum.
27	Conduct team retrospective	Organiser, facilitator(s), community partner(s)	Within 2 weeks after	Debriefings may be held with different configurations of stakeholders as needed.
28	Collect participant feedback (cont.)	Organiser, community partner(s)	1 month after	Participant feedback on a later date gives organisers a better indication of medium-to-long term impact.

Organiser FAQs

Getting started

How do I know if this is the right format for me, or for my project?

If the knowledge exchange and stakeholder engagement objectives that you are hoping to achieve align with the objectives that a Futures Forum method seeks to deliver, this could be an option worth considering. Futures Forums engage participants in longer term, big picture thinking. For those seeking prescriptive answers or evidence to inform a specific policy direction, there may be other knowledge exchange mechanisms better suited than the Futures Forum method.

Overall, we believe the methodology provides enough flexibility to accommodate a range of funding and resource constraints.

Finding people

What do I do if I don't have other facilitators?

As the Futures Forum methodology does not require specialised expertise in futures thinking, organisers may explore contracting professional service providers who offer facilitation services. In some situations, some attendees, e.g. other researchers who are familiar with participatory methods, might also be comfortable and willing to take on a table facilitator role.

We generally recommend having contingency plans for last minute staffing changes, accounting for situations where a facilitator or speaker falls ill, for example.

How do I actually find a researcher?

Other than connecting with people through professional networks, databases such as UCL's Find an Expert (<https://www.ucl.ac.uk/experts/>) or similar tools at other academic institutions may be a helpful starting point. Organisers may also find the researchers leading the debate on various policy topics through platforms like Overton (<https://www.overton.io/>) or by conducting desk research on the topic.



Who should I target to speak for the “Setting the scene” module?

The “Setting the scene” module should aim to provide participants with a well-rounded view of how different communities approach the event topic or policy issue. The target profile of the speakers ultimately depends on the event objectives and the background of the other participants. For example, a Futures Forum on early childhood development might benefit from having a parent as a speaker. There is typically at least one speaker representing each stakeholder group in attendance, and speakers may also join table discussions.

Who is a policy stakeholder – and do I have to have them there?

This toolkit takes a wide definition of policy stakeholder to mean anyone who is involved in or who influences decisions in policy development and delivery. This may include public engagement leads at foundations, policy analysts at think tanks, government project delivery professionals, and more.

For some events, the policy stakeholder perspective might be secondary and having a policy audience is not mission critical. The Futures Forum methodology could prove just as useful for public engagement, for example.

Planning the event

Should I include stakeholders in the planning process? If so, how?

Depending on the organiser’s institutional affiliation and subject matter expertise, it may be beneficial to include stakeholders in the planning process, especially in the early activities of defining objectives, scoping the event, and mapping stakeholders. In this toolkit, we refer to this set of stakeholders as “policy, research, or community partners”.

Other stakeholders, such as the speakers and facilitators who actively contribute to the content and delivery of the event, may also provide a feedback loop for organisers in further shaping the event.

Is the “setting the scene” module always speaker presentations?

No. The purpose of this module is to give participants common reference points for understanding the ways that different communities are exploring the future of the event topic. So long as this purpose is met, the content and format are open to innovation.



How can I find the right balance between effective planning and overplanning?

At the centre and forefront of every Futures Forum, including for organisers’ workflow, are the event objectives. Critically appraising whether, and how, certain tasks contribute to the event objectives may help organisers prioritize the remaining open tasks.

Delivering the event

This is the first event I am facilitating. What do I need to know?

The role of facilitator is to create an open and safe environment, where everyone's opinions can be heard. It helps for the facilitator to state this in the beginning to set expectations with all participants. Facilitators will need to adapt to group dynamics on the day and make sure that all participants feel comfortable contributing.

The supplementary artefacts packet (<https://www.ucl.ac.uk/steapp/collaborate/policy-impact-unit/innovating-engagement/futures-forum>) includes a facilitation cheat sheet that facilitators may use to prepare. Some might also find additional reading on participatory research methods to be helpful. We recommend that the Chair or room facilitator have prior group facilitation expertise and make themselves available to support table facilitators during breakout discussions.

My future forum is taking place online. How should I adapt for this?

In terms of technical setup, organisers may leverage conferencing tools with “breakout room” functionality as well as collaboration software such as Miro to replace tables. It is important to consider accessibility issues and ensure participants are adequately informed and set up.

With limited physical and visual cues, facilitators and organisers will need to be mindful of group dynamics and maintaining an environment where everyone is able to stay engaged.

How can I create an inclusive space for participants who speak English with different fluency levels?

The Futures Forum facilitation plan and participatory methods are designed for inclusivity. That said, during facilitation training, facilitators may consider roleplaying and engaging in empathy for a range of expected participant needs, to identify the portions of the event that may need adjustments.

The Supplementary Artefacts document is available for download from the [UCL Policy Impact Unit website: https://www.ucl.ac.uk/steapp/collaborate/policy-impact-unit/innovating-engagement/futures-forum](https://www.ucl.ac.uk/steapp/collaborate/policy-impact-unit/innovating-engagement/futures-forum).

If you have any feedback or questions that aren't answered in this toolkit, please feel free to contact us at policyimpactunit@ucl.ac.uk. The Policy Impact Unit are also exploring future iterations of the Futures Forum model, so please get in touch if you would like to find out more as you plan your event.



About the Policy Impact Unit

The Policy Impact Unit (PIU), based at UCL's Department for Science, Technology, Engineering and Public Policy (STePP), is a team of policy engagement specialists who help make UCL evidence and expertise more accessible to policymakers. PIU design bespoke policy engagement strategies which tease out the 'so what?' from research projects and deliver real world impact – from shaping legislation, engaging Ministers, supporting Select Committees and more – at a local, national, and international level. PIU also develop and champion new, innovative methods for bringing academic and policy communities closer together.

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