

# Fantastic Facilitation

## Leading Effective, Inclusive Meetings

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Facilitating a meeting is a very important skill to have. A facilitator brings a group of people, who may or may not get along, to focus on a specific topic. For example, sometimes the goal of a meeting is to make a plan of action; other times it may be to talk about things going on in the community.

There are many important things to remember when facilitating a meeting. Here are a few tips we've gathered for self-advocates to use when facilitating a meeting. After you've read this guide, you may be interested in another resource guide that we have, **Getting What You Came For: A Guide to Using Meetings to Advance an Agenda.**



### Agenda

Creating an agenda is very important to do **before** leading a meeting. Usually the facilitator puts together an agenda several (three to five) weeks in advance. The facilitator sends the agenda to everyone who will be in the group two weeks before the meeting. The facilitator sends the agenda again a day or two before the meeting.

The agenda tells the group **what they'll be working on**, and helps the group stay on track. Usually, the agenda has the **date and name of meeting** at the top. On the left side of the paper, the agenda says what time the items will be addressed. On the right side, it says what each item is.

### Sample Agenda

Self-Advocates In Action! Fall Meeting  
October 10, 2013

1:00 – 1:30 PM	Welcome and Ice Breaker
1:30 – 2:15 PM	Updates from Committees Policy Committee Media Committee
2:15 – 3:00 PM	Committee Discussion Time
3:00 – 3:15 PM	Break
3:15 – 4:00 PM	Advocacy Issues to Focus On This Year
4:00 – 4:15 PM	New Business
4:15 – 4:30 PM	Closing and Clean Up

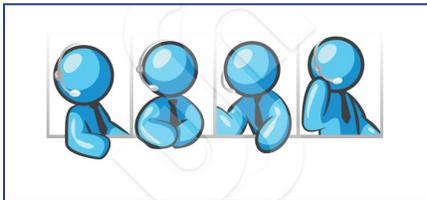
### Sample Facilitator Only Agenda

Self-Advocates In Action! Fall Meeting  
October 10, 2013

1:00 – 1:30 PM	Welcome and Ice Breaker (Elena leads, welcome is 10 mins, “what is your favorite season?” ice breaker for 20 mins)
1:30 – 2:15 PM	Updates from Committees Policy Committee (Jose, 15 mins) Media Committee (Denise, 15 mins)
2:15 – 3:00 PM	Committee Time (break out into committee groups, Gerald, Jose, Denise lead groups, Elena walks around to quietly sit in on groups and offer help. Elena gives 5 min warning at 2:55.)
3:00 – 3:15 PM	Break
3:15 – 4:00 PM	Advocacy Issues to Focus on This Year (Jose and Elena lead)
4:00 – 4:15 PM	New Business (Elena leads)
4:15 – 4:30 PM	Closing and Clean Up

It can helpful to write a separate **facilitator’s agenda**. The facilitator’s agenda has all of the content that the other agenda does, but it also **has information for the facilitator to remember**. The facilitator’s agenda is more private because the whole group does not need to know all the details. Details on the facilitator’s agenda may be **who will lead each item, and for how long**. It can also be helpful for the facilitator to write tips for themselves on the facilitator’s copy.

## Ground Rules



Ground Rules (sometimes called “Group Agreements”) are rules a group agrees to follow during a meeting. If a group meets regularly, the group may come up with their ground rules at their first meeting and then

follow them at every meeting after. You write ground rules on a big piece of butcher paper. [Butcher paper = tall sheets of paper facilitators write on. They are typically two feet tall. They come on a stand or with a sticky back

(like a big post-it note) that you can post to a wall]. You hang the ground agreements up in the front of the room where everyone can see it. Some facilitators draw pictures next to each item so people can understand what the rule is saying. (For example: “Stay on time” might have a clock next to it).

It is usually best for facilitators to draft up 3-5 ground rules before the meeting. This is to save time. It can take a group 20-30 minutes to come up with ground rules on the spot. You usually want to only spend 5-10 minutes going over ground rules.

### **Some common group agreements**

- **Stay on time.**
- **“One Diva, One Mic”.**  
This is just fun way to say **one person speaks at a time.**
- **Step Up, Step Back.**  
This means if a participant notices they are speaking a lot, they should try to step back so others can speak. If a participant notices they are speaking little, they will agree to try to speak more.
- **Respect each other.**
- **Create safe(r) space.**  
As a facilitator, you can’t guarantee that everyone will feel truly safe. However, everyone can agree to take responsibility to create a safer space. Part of creating a room where people feel safer is challenging prejudice, like racism. It can also mean taking responsibility to step in when you see bullying or harassment.

## Leave Your Problems at the Door

As a facilitator, you are responsible for guiding the conversation so the group can accomplish what they want. This actually involves a lot. You have to actively listen. You have to know what people are feeling. Sometimes you have to be like a traffic cop and change topics.

To be able to do this, you have to be fully present with the group. This means you have to have all your attention on the group. If you are upset or distracted about something, you have to try and let it go before you come into the group. If not, it will hurt your ability to facilitate the group.



## Roles at the Meeting

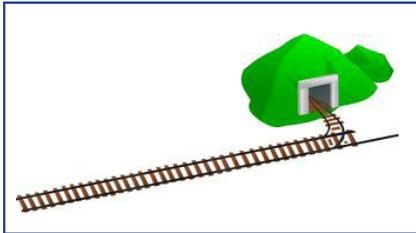
Often times, it can be helpful to have two facilitators. This way, the facilitators can take turns. When the other person is facilitating, you can take a break or use the time to address a problem in the room. (Example: if someone has a problem, the second facilitator can check in with the person. Or if the room is hot, the second facilitator can go turn down the thermostat.)

### Some roles that the group may need:

- Person to write notes on big butcher paper so everyone can see.
- Person to record notes. Often, notes are called “minutes”.
- Person to keep track of time.
- Person to “queue” participants who have their hand raised. This means tracking who are the next few people to speak.

It can also be helpful to have other people play roles.

However, you don't want too many people leading the group. That can get confusing. It is best if there are two facilitators and a third person to record notes. Usually the two facilitators can write notes on the butcher paper, keep time, queue participants, and facilitate.



### Dealing with “Derailing”

Often, when you have a meeting, people have a lot they want to share. However, what they want to share may not relate to the topic you have to discuss. Derailing may happen because a person feels what they have to share is really important. It can also happen in groups where people have a variety of communication styles.

As a facilitator, you have two goals: to try to make people feel respected, and to keep the group on target so they can cover everything on the agenda. This means that part of your job is tracking the conversation. If you notice someone going off topic, you may have to step in.

There are ways to step in without being rude. Here are a few suggestions for **transition phrases**. Transition phrases are things you can say to get the group to go from what one person is talking about to your agenda item:

#### **Transition phrases:**

- “That’s a really good point. It leads us to our next agenda item...”
- “So what I hear you saying is... That connects to what we’re saying by...”
- “That’s an important thing to talk about. It’s so important we should give that topic its own time on the agenda at the next meeting. For now, we have to stick to this topic, though.”

As a facilitator, you don't have to talk about every single thing someone brings up. For example, sometimes when facilitators get asked a question during a meeting, they feel like they have to answer it right there. However, the answer can distract people and cause more derailments. Sometimes it is better to say "that's a really good question, but not completely related to the topic. We can talk about it after the meeting." The same is true with topics: just because someone brings up a topic does not mean the group has to talk about it at that time.

## **Parking Lot**

Some facilitators like "parking lots". A parking lot is a tool you can use to prevent derailing. The facilitator hangs up one piece of white butcher paper on the wall and labels it "Parking Lot". If someone brings up a topic or question that the group doesn't have time to address, you can put it in the parking lot; you write out the topic on the paper. At the end of the meeting you go back to the parking lot and either answer the topic or make a plan to address it later.



## **Accessibility**

As a facilitator, it is important to make your space accessible for people. However, it is even more important for people with disabilities, since a lot of people can't participate if they don't have their access needs met. Some groups call access needs a "reasonable accommodation".

A reasonable accommodation is a very specific, legal definition. It means a change in environment or service that allows a person with a disability to participate. Depending on the group and resources available, some access needs should be made available automatically while others needed to be requested ahead of time by the

individual who needs them. As a facilitator, it is important to figure out how much time you would need to plan for a reasonable accommodation and to let participants know what they need to do to request a reasonable accommodation. (For example, a general rule of thumb is three to five days to request Braille or American Sign Language. However, if you don't have things in place to coordinate that in three days, you should ask participants to give you a longer window of time).

### **Some access needs are**

- **Alternative Formats.** If someone cannot read standard print, they may need Braille, large print, a digital copy, or for someone to read the text to them.
- **ASL Interpreters and/or Real-Time Transcription services.** If someone communicates via American Sign Language, they may need an ASL interpreter. Some people need CART, which stands for Computer Assisted Real-Time Translation. CART is when someone types what is being said aloud on a computer so a person can read it.
- **Wheelchair accessibility.** As a facilitator, you may need to remind people to keep the aisles clear.
- **Breaks.** Many people need to take breaks. You will want to build in 15-minute breaks throughout your agenda. You want to make sure people know they can get up and walk around any time they need.
- **Accessible Language.** It is important to use words that are easy to understand. This includes explaining words people may not know and using pictures when possible.
- **Using Different Learning Styles.** People learn in different ways. As a facilitator, you will want to include activities that support all kinds

of learning styles. (For example: skits, small group activities, videos, journaling activities, etc).

- **Letting People Take Care of Themselves.** People generally know what they need. Some people need to stand, walk around a room, or stim [repeating a body movement]. Others may need to leave during breaks for personal care. You can check in if you're worried about someone, but it is important to let people be free.

## Accountability



Good meeting facilitation is very important, and so is holding meeting participants accountable. Sometimes it will be difficult to avoid derailing, or to make progress on previous meeting decisions. Here are some tools to help make that happen:

- **Minutes** from the meeting can help remind people of what they agreed to within the meeting, as well as making it possible to communicate what happened within the meeting to people who did not attend. Minutes are a summarized review of what everyone said, did, and agreed on within the meeting. They are generally one to eight paragraphs long. A facilitator can take minutes, or you can choose someone else to do so.



- **Notes:** Meeting notes are remarks on relevant things that were said in the meeting. They are different from minutes in that they are much shorter (can be stated in bullet points), and in that they do not have to state exactly what happened in the meeting – they can include afterthoughts from the facilitator, or can be paraphrased. The goal of note is to communicate as quickly and simply as possible what everyone's takeaway from the meeting should be.

Notes and minutes are often sent out within a day of the meeting, by email, to people who were at the meeting. They can also be sent to your supervisors, or to people who request them – minutes especially are a good way of communicating what happened to people who did not attend the meeting.

## Online Meetings



Online meetings can be different from in-person meetings in many significant ways, depending on what kind of online meeting you're in. We'll review a few different types of online meeting:

**Video chat:** Video chat meetings are more like face-to-face meetings than any other kind of online meeting. The specifics of how the meeting works may change - people might use screen-sharing rather than white butcher paper to share and record ideas about something, for example - but the overall process can remain the same as an in-person meeting, and the facilitator's concerns and goals are similar.

**Instant Message (IM):** IM has created opportunities for groups to meet via text-only messages on a computer web browser. As a facilitator, you cannot rely on visual cues (like pointing to someone) that you maybe can use in an in-person meeting. This means that you have to create more intentional structures around prompting people to speak and making sure that everyone is paying attention and speaking in turn.

In an IM meeting with many participants, it's often best to designate the leader as the person who speaks by default, and ask the other participants to type something (like their first name) to indicate when they have a comment or question. This prevents everyone from talking at the same time and drowning out the discussion. It can also be helpful to have a symbol for people to use when they're done talking so the next person can start typing.

**Email:** Email meetings are easier in that they give each participant time to reflect on their thoughts, but harder in that they are not real-time. Over email, people are not all gathered in the same “place” at the same time during an email meeting, so they can take a lot longer than other kinds of meeting to reach any sort of consensus. They also have the problem of making it very easy for people to not participate - not answering an email is easier than ignoring an IM or a direct, spoken question.

Email meetings are generally best for interview-type meetings - providing people with a list of questions for them to answer and send you when they are finished. This can actually be faster and simpler for both parties than a face-to-face interview would be, since it gives the interviewee time to craft their response.

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For questions about this resource guide, please contact the **Autistic Self Advocacy Network (ASAN)** at [info@autisticadvocacy.org](mailto:info@autisticadvocacy.org)

This Resource Guide was developed for ASAN’s **Pacific Alliance on Disability Self-Advocacy** project. Pacific Alliance is an effort funded by the Administration on Intellectual and Developmental Disabilities to support self advocacy groups with technical assistance. For more about the ASAN or the Pacific Alliance, visit us at [www.autisticadvocacy.org](http://www.autisticadvocacy.org).



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*The Autistic Self Advocacy Network (ASAN) is a non-profit organization run by and for autistic people. ASAN provides support and services to individuals on the autism spectrum while working to change public perception and combat misinformation. Our activities include public policy advocacy, community engagement to encourage inclusion and respect for neurodiversity, quality of life oriented research and the development of autistic cultural activities.*