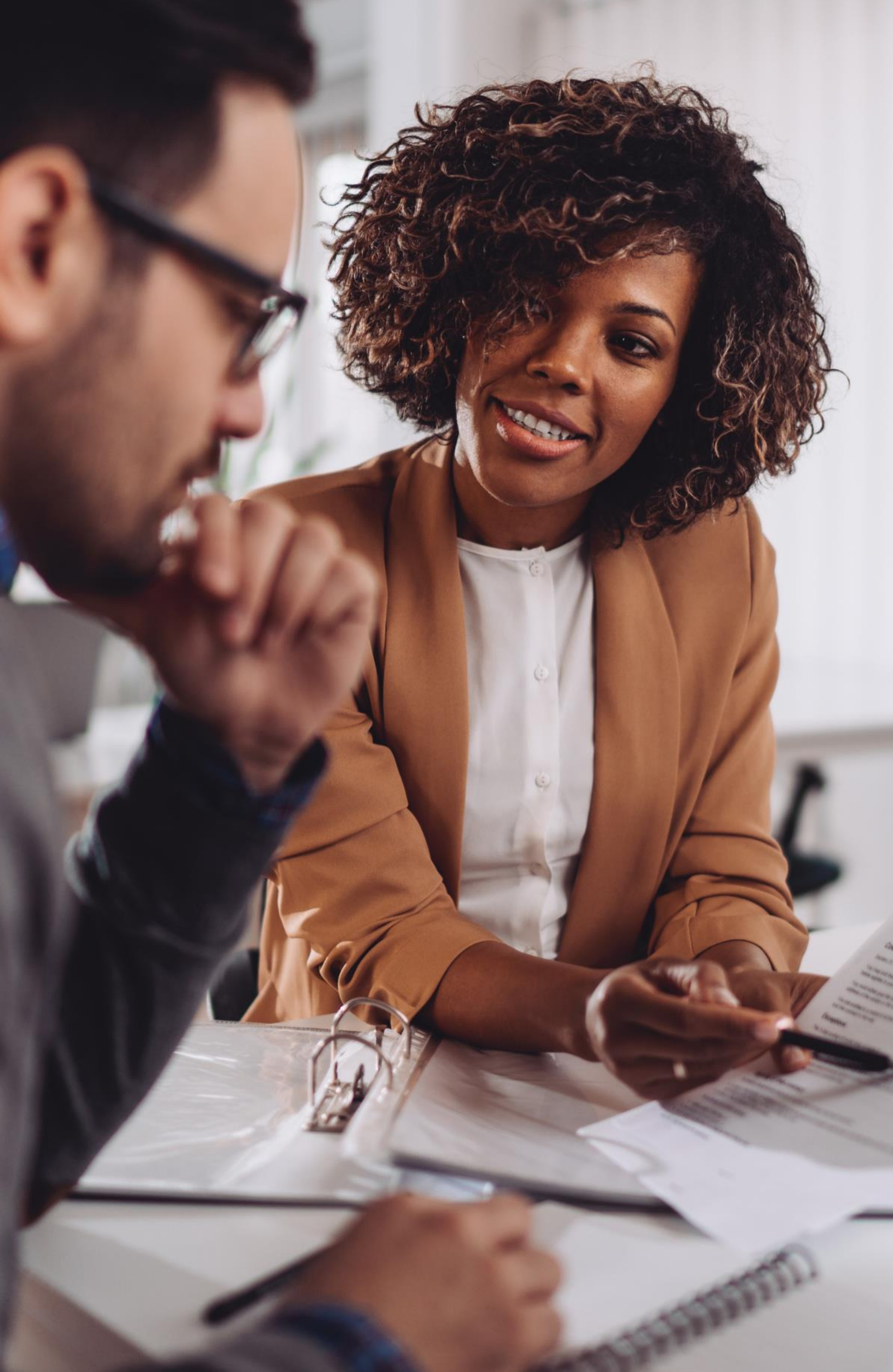

Tips for Effective Community Engagement Meetings

COLLECTIVE INSIGHT

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About Collective Insight

Collective Insight, LLC (Collective Insight) is a Massachusetts-based certified woman-owned community engagement consulting firm founded in 2014. We are enthusiastic about inclusion: Collective Insight believes that systems are stronger when people with lived experience are involved in the design, delivery, and improvement of services. We support individuals with lived experience to find and use their voice effectively while assisting organizations to design and implement meaningful strategies to engage those most impacted by their work. Collective Insight operates three divisions: Engagement Training and Support; Research and Program Evaluation; and Policy and Program Innovation. If you are interested in collaborating with us, please email info@collectinsight.com or visit our website. Also, sign up for our newsletter to learn helpful engagement tips and to register for future engagement trainings.

Tips for Effective Community Engagement Meetings[1]

This tip sheet describes strategies for effective meeting facilitation when engaging communities most impacted by your work. Remember: effective meeting facilitation begins prior to the meeting and continues after the meeting concludes. Accomplishing necessary tasks and ensuring participants are heard requires flexibility, preparation, in-meeting facilitation skills, and follow up.

[1] McGaffigan, Erin. "It's not so Simple: Understanding Participant Involvement in the Design, Implementation, and Improvement of Cash & Counseling Programs." (2011). *Graduate Doctoral Dissertations.* 55. https://scholarworks.umb.edu/doctoral_dissertations/55

Create an Accessible Meeting Space

Accessible In-Person Meetings

Check that any in-person meeting place is accessible to all potential meeting participants:

- Ensure there are wheelchair ramps and accessible doorways, including in hallways, meeting rooms, and restrooms.
- Ensure meeting rooms are easy to locate and close to restrooms. Ensure proper signage to the meeting room and restrooms.
- Make sure there is enough room for each participant to move in and out (and around) the meeting room, regardless of whether wheelchairs, walkers, or other mobility devices are used.
- Choose meeting spaces that have bus stops nearby for those who can use public transportation.
- Ensure there are effective microphones and speakers, especially in large or busy meeting spaces. You may assume this is not needed, but often it is.

Support meeting participants to be ready for the meeting:

- Ask if meeting participants need assistance with transportation coordination and/or payment and help accordingly.
- Ask if meeting participants need language interpreters and/or CART providers and schedule and confirm accordingly. Often, these services need to be scheduled weeks in advance.
- Ask if meeting participants need any other types of accommodations, such as large print, braille, electronic files, or preparation support and help accordingly.
- Send out directions on how to get to the building and meeting room ahead of time.
- Be at the meeting early to set up and test your space ahead of time, including microphones, speakers, elevators, and walkways.

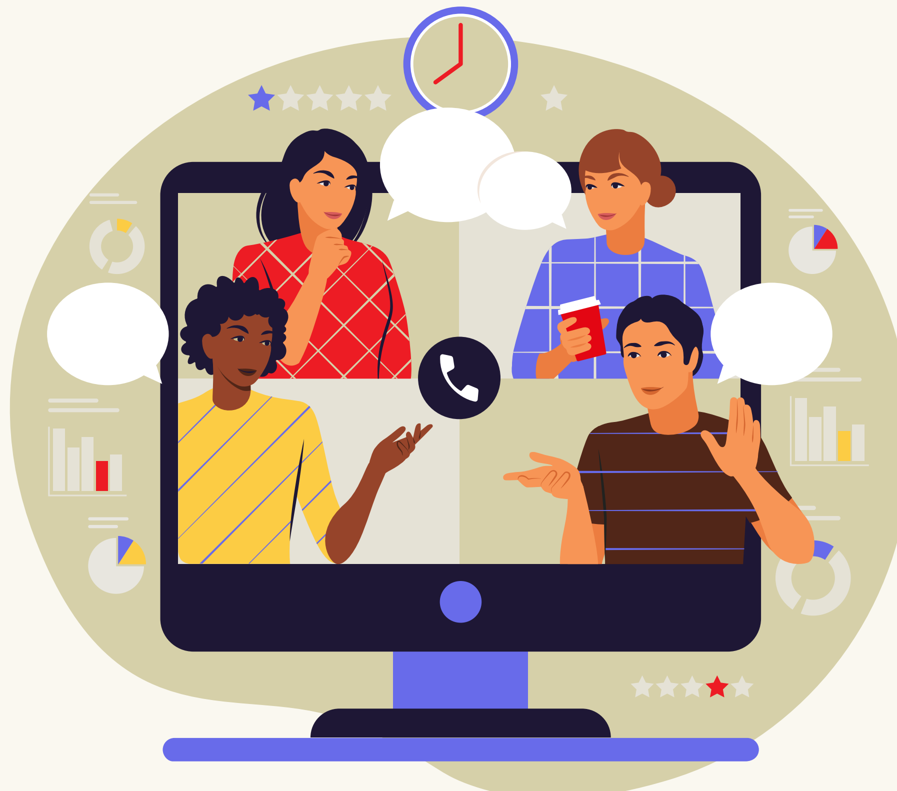
Do not forget meal preferences:

- Request information on food allergies, dietary restrictions, and food preferences and be responsive to these needs.
- Short meetings should have some small refreshments, such as water, fruit, cookies, and/or coffee.
- For longer meetings (e.g., over two hours), consider breaks with small meals that reflect participants’ needs and preferences.

Accessible On-Line Meetings

Confirm participants' access:

- Confirm that all participants have access to reliable, high-speed internet and devices that allow them to access an online meeting platform (e.g., computer, chrome book, iPad, phone, etc.).
- Confirm that all participants have cameras on their devices or access to a low-cost camera to add to their device.
- Provide mini grants that support participants to access the required internet and equipment or link participants to community partners who can successfully support their needs.
- Ask if meeting participants need language interpreters and/or closed captioning and schedule and confirm accordingly (closed captioning interface can be difficult to set up initially).



Dedicate time to help and practice:

- Share directions with participants on how to access the meeting and confirm they are comfortable using the online platform.
- Budget time for 1:1 calls with participants to set up the platform on their device and provide any technical assistance required.
- Test your online platform with participants prior to the meeting.
- Open the meeting 30 minutes early to allow time to troubleshoot technology with participants, including ensuring microphones and cameras are working.
- Assign a support person or co-facilitator to moderate the online meeting platform and online chat to ensure responsiveness.

Accessible Hybrid Meetings

Hybrid meetings that include both online and in-person participants can be especially tricky:

- Ensure your in-person meeting space is equipped with the technology necessary for a hybrid meeting, including high speed internet, at least one large screen, and multiple microphones.
- Check that the room allows in-person participants to sit in a way that online participants can easily view the people in the room.
- Assign an in-person moderator or co-facilitator who has the one job of ensuring those online can hear and participate in the meeting. This person must be prepared to advocate for the engagement of those participating virtually by monitoring chat, stopping the group for virtual questions or comments, and muting and unmuting lines.

Visit this ADA Resource for more strategies to ensure accessible in-person meetings.

Review this Essential Accessibility Blog for additional strategies to increase the accessibility of on-line meetings.

Find more information on accessible facilitation for adults with disabilities in this resource from Autism Self-Advocacy Network: "Planning Accessible and Inclusive Organizing Trainings: Strategies for Decreasing Barriers for People with I/DD"

Prepare For Your Meeting

Develop a Charter and Meeting Guidelines

Develop and update a Charter to clarify purpose and expectations:

- The Charter outlines the group's purpose, why the group was developed, goals, meeting frequency, meeting methods, required time investment, and financial and non-financial incentives.
- When possible, develop this document with leaders from the communities you seek to engage.
- Make sure your leadership reviews the Charter and is prepared to apply any new learning that results from the group's work.
- Use your Charter when conducting outreach so people can make informed decisions as to whether or not they want to participate.
- As your group takes shape, continue to review and revise the Charter based on input from those you engage.

Create Meeting Guidelines to set group norms:

- When possible, develop your Meeting Guidelines with leaders from the communities you seek to engage.
- During your first meeting, review the Meeting Guidelines and welcome edits and additions. Ensure meeting participants agree to these Meeting Guidelines before you begin your work.
- Review your Meeting Guidelines routinely as a group and revise, as needed. Meeting participants will begin to hold each other accountable for adhering to respectful group process, even during times of conflict.

Create a Purposeful Agenda

Create a goal-oriented agenda and stick to it:

- Put the meeting objective(s) at the top of your agenda. Make sure your goals for the meeting are reasonable and attainable.
- Allocate time to review and modify the group's Charter and Meeting Guidelines during the initial meeting and as needed.
- Make sure decision makers are in the room or are appropriately briefed on meeting focus and intended outcomes.
- Do not overload your agenda! Consider what must be accomplished and what is possible to accomplish between meetings, through other methods, or during the next meeting.
- Add time limits to each agenda item. Your schedule should include time to set the stage with some general information, time for participants to seek clarifications, and opportunities to brainstorm with pre-determined open-ended questions.
- Do not just repeat what you did during your last meeting. Instead, start the meeting with what you learned during the last meeting and what you did with this information. Then, build from there.
- Take time at the end of the meeting to review what you heard and build consensus on what this means for next steps.
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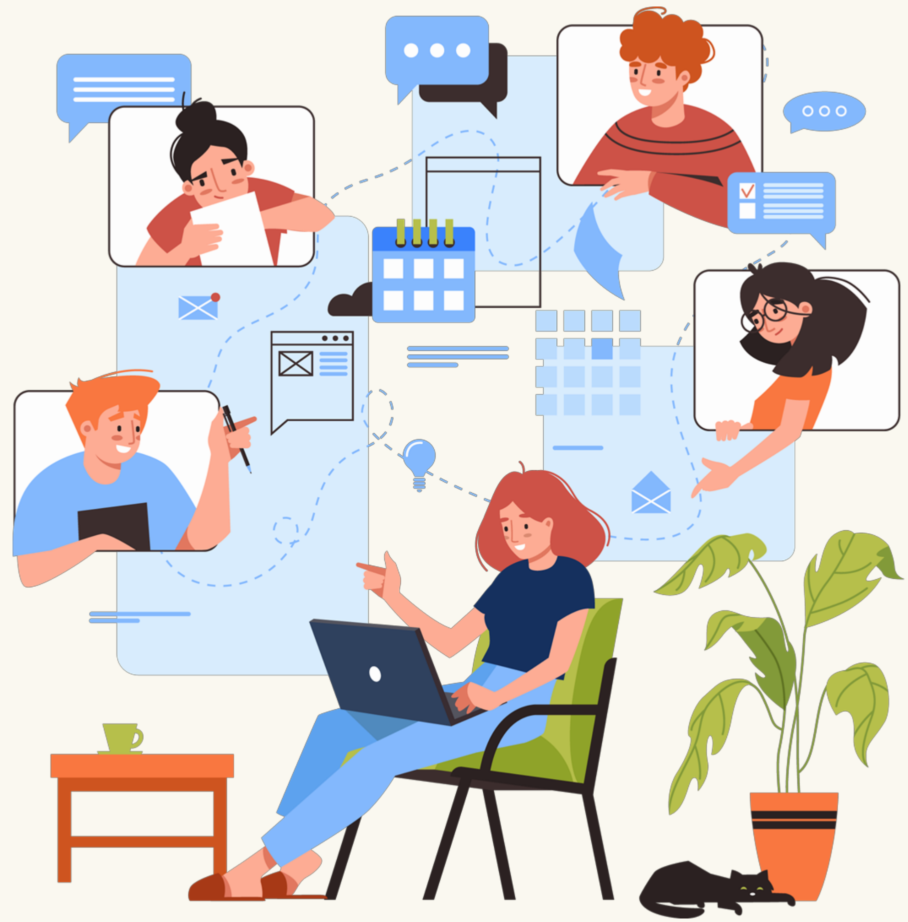
Send Out Meeting Materials in Advance

Communicate that attendance is needed by sending materials in advance:

- Confirm the formats meeting participants need, such as large print, braille, electronic copies, screen reader accessible, mailed copies, etc. Budget funds accordingly.
- Address these accommodations consistently and share the meeting materials in the required format at least one week early.
- If the meeting is in person, bring these required materials to the meeting, too. Consider providing meeting participants with a binder and 3-hole punching materials to add to their binder.



Assign a Notetaker

Appoint someone to document your meetings:

- Reach out to a meeting participant or colleague in advance of the meeting to discuss note taking responsibilities.
- Make sure this person is detail-oriented and has experience taking notes of fast-moving conversations.
- Have the notetaker highlight next steps and report back the next steps at the end of the meeting to seek consensus.
- Clean up the meeting notes the very next day when all points are still fresh. Make sure the notes are organized into themes so they are easily applied to the group's products.

Use Your Meeting Wisely[2]

Start and End on Time

Participants' time is valuable:

- Consistently running over time in your meetings sends a message that you do not understand other people are busy, too.
- Adhering to your agreed upon time tables builds trust because people see your process as productive and reliable. This provides participants with an incentive to show up!
- While you are actively listening, a co-facilitator can keep an eye on the clock and speak up if an agenda item is going over its allotted time (taking the burden off you).

Use the Agenda to Ensure Progress

Effective use of agendas creates predictability and builds trust:

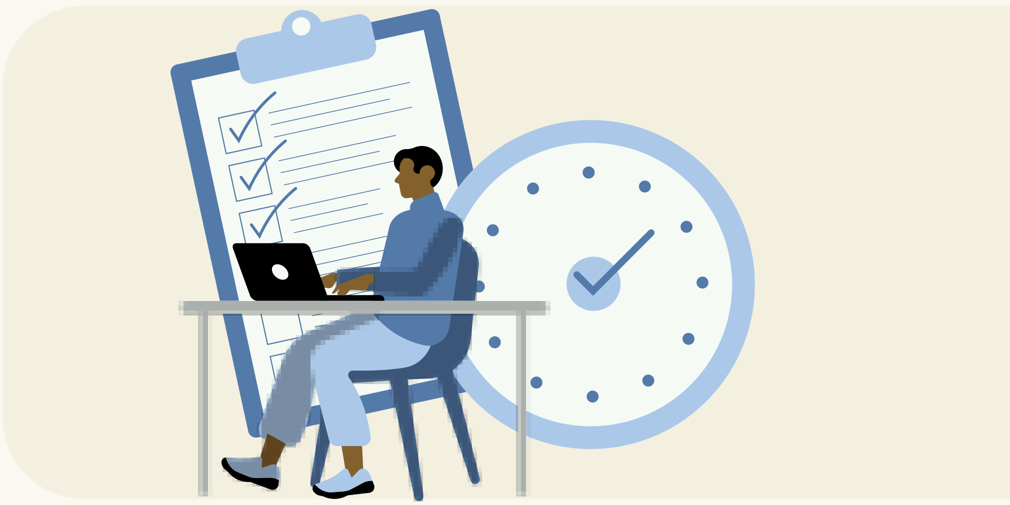
- Apply active listening. People can tell when you are not paying attention and you are simply trying to get to your next topic.
- If participants are veering off topic, thank them for their contribution and use time to reflect on what was said and what it means for the meeting's focus.
- If conversations consistently veer off topic, consider why. Ensure the group's purpose and agenda topics are important to the participants. If not, consider modifying your purpose or revisiting representation to include people with aligned goals.

[2] Axner, Marya. "Section 2. Developing Facilitation Skills." Community Tool Box. https://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main

Use Presentation Slides to Stay on Track

Presentation slides can help guide your meeting:

- Have introductory slides for housekeeping (e.g., where to locate the exit and restroom or how to mute or unmute your phone).
- Use a slide or two to review your meeting objectives, agenda items, and materials. Take time to review and seek consensus. This can be grounding for everyone.
- Use large font (e.g., 24+), lots of white space, and plain language in your slides. Add pictures to break up text. Ensure a sharp contrast between your text and background.
- If your slides include video clips, share your sound with online meeting participants and test videos prior to your meeting to avoid in-meeting delays.
- If participants advocate to stay on the topic, you may have misallocated time. Work with participants in real time to modify the agenda timeframes and apply this learning to future meetings.



Encourage Inclusive Discussion

Accessible language and reflective communication techniques can increase active participation:

- Adapt what you say so that your speech is to the point and spoken at a pace that others can follow. There is no need to rush. Even the most complicated topics can be described simply.
- Avoid jargon and acronyms—if your meeting must use certain words or acronyms that not all community partners are familiar with, define them together and create glossaries for future use.
- Summarize and clarify what you heard after each agenda item. This demonstrates that you are listening and allows others to confirm you have it right.
- If you are confused about a participant's point, ask the person to clarify—this shows you want to understand what is said and accurately document what you heard.
- Consistently thank people for their unique points and insights.

Make space for silence:

- Some participants will need more time to process a question and respond to this question. Give them that time.
- Diffuse the awkwardness of silence by recognizing it out loud: "I am going to be silent for a few moments to allow everyone time to think about their response and contribute."
- Utilize open ended questions that allow participants to elaborate beyond "yes" or "no" answers. It is ideal to have 1-2 open ended questions ready for any brainstorming section of your agenda.

Use Meeting Guidelines to Handle Conflict

Conflict can be a positive part of meaningful engagement:

- Make sure your Meeting Guidelines are co-created, reviewed, and agreed upon by all meeting participants. Work with meeting participants to hold each other (and you) accountable.
- Do not hide from contentious topics, but rather call them out diplomatically. Then, take time to document the various viewpoints. You will start to find consistent themes and points people can agree on.
- Do not feel the need to solve problems during the meeting. Sometimes consensus is not the goal, but understanding is.
- Consider drafting broad-based principles the entire group can get behind. Then, use these principles to improve products.

Review MindTool's work on Active Listening skills.

Learn more about conflict resolution strategies, check out this training from Community Tool Box: Conflict Resolution Training.

Visit this Community Toolbox' facilitation tool to learn more best practices.

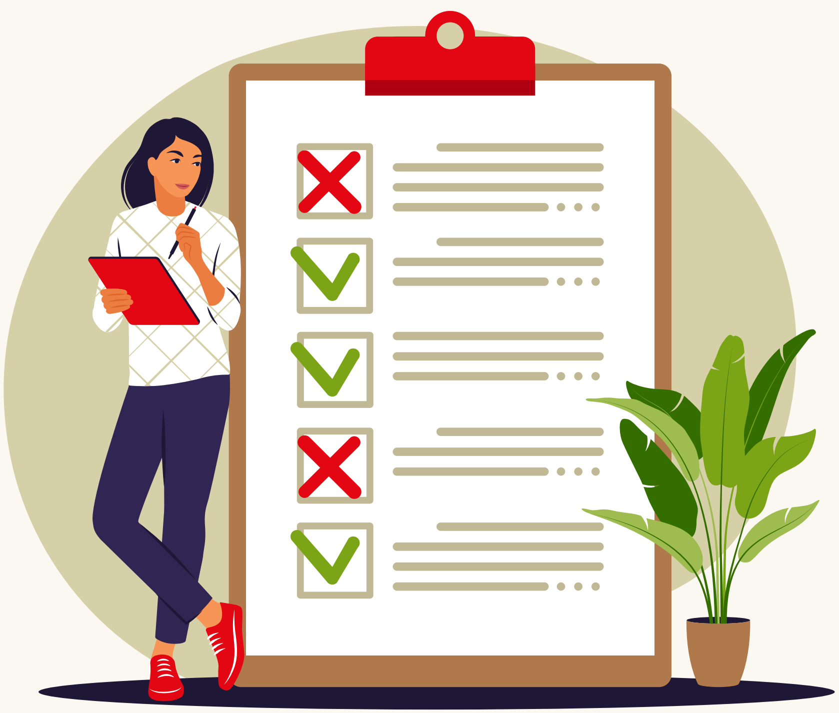
Visit the GRID Toolkit to learn more strategies for prioritizing equity in your facilitation.

Close the Loop

Review Next Steps and Action Items

What you do with what you learn will matter:

- Take time at the end of each meeting to summarize what was discussed. While you should be prepared to summarize what you heard, your notetaker should be ready to share next steps.
- Assign next steps to individuals, whenever possible. Consider assigning time-intensive tasks to paid staff while asking meeting participants to help inform these tasks in a meaningful way.



Document and Share Meeting Notes

Meeting notes keep everyone updated and hold everyone accountable for progress:

- Your notetaker should record themes and action items during the meeting, which should be the foundation of your meeting notes.
- Your meeting notes should not focus on who said what, but rather summarize discussions and reflect key themes and takeaways.
- Make sure meeting notes are organized into themes so they are easily applied to the group's products.
- Share your meeting notes within two weeks and again with your future meeting materials. Ask meeting participants to confirm your meeting notes are accurate.

Share Progress at the Next Meeting

Now is the time to demonstrate your meetings are worth others' time:

- Start your next meeting by reviewing what you learned at the last meeting and how this has been applied to your work.
- Revisit the next steps from the last meeting and demonstrate progress on all of your next steps.
- Always recognize the progress you and other meeting participants have made, no matter how small.
- If next steps have not been completed by others, assess if they are a priority and strategize on how to get them done.

Evaluate Progress

Reflect on Successes and Challenges

Explore the following:

- Do meeting participants buy-in to your purpose and focus areas?
- Are you sharing too little or too many materials? Are your materials accessible?
- Do you have too much on the agenda or too little? Are your meetings too long or too short?
- Do you have the right open-ended facilitation questions to spark interesting and fruitful conversations?
- Are you addressing topics that could be done better through other means, such as surveys or small group work?
- Are meetings held often enough to inform your decisions? Are meetings happening so frequently you are unable to demonstrate progress?

Assess Meeting Satisfaction

Ask how you can improve and then apply what you learn:

- Routinely issue short paper or online surveys to assess satisfaction with meeting logistics, accessibility, focus, and outcomes.
- Use meeting time to discuss survey results and share what you have done in response to the findings. Leave time for participants to share additional feedback and discuss new ideas.

Collective Insight's PAE Attention Framework

Collective Insight's PAE Attention Framework provides a strong foundation for understanding and implementing meaningful engagement across a broad range of program, policy, and research activities.

The People, the Approach, and the Environment matter, especially when it comes to engagement preparation, facilitation, and follow-up. Learn how they matter and more about Collective Insight's PAE Attention Framework [here](#).