



Community Engagement Toolkit: Essentials for Planning & Facilitating Meaningful Conversations

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Introduction

The National Aging and Disability Transportation Center's Community Engagement Toolkit provides step-by-step guidance and materials to plan, organize and facilitate a community meeting to discuss how well local transportation options are meeting the transportation needs of individuals in the community. Bringing together transportation providers and stakeholders, community members, and transportation users creates an opportunity to have a meaningful conversation to identify areas of need, highlight programs that are working and develop an action plan to begin addressing the identified issues, working to improve transportation for everyone.

How to Use this Toolkit

The materials and resources in the toolkit are meant to reduce the time and energy needed to plan and facilitate a successful community meeting. Below is a list of what is included in the toolkit.

1. **Meeting Facilitation Guide** – includes an accessible meeting checklist, steps to prepare for a meeting conducive to an open discussion and tips for leading the meeting
2. **Recruitment Strategies** – provides suggestions on the sectors that should be represented at the meeting, the types of people who would make good participants and guidance on the recruitment process to assemble a group of people with varying perspectives and influence
3. **Sample Agenda** – offers a suggested format for your meeting which can be revised to meet your needs
4. **Workshop Discussion Guide** – includes discussion questions to get the conversation going as well as tips on how to facilitate in a way that draws input from all attendees
5. **Creating an Action Plan** – provides information about how to create and use an action plan to move your ideas for improvement forward, including step by step instructions and an action plan template
6. **Introductory Letter for Participants** – offers suggested language for providing information about the meeting and confirming the expectations of the attendees

Meeting Facilitation Guide

Successful meetings require careful planning and preparation. The physical location must be chosen carefully to ensure accessibility to all, and the general atmosphere of the meeting needs to be set and maintained by the facilitator. None of this happens automatically but can be arranged by following the guidance below.

Accessible Meetings

To be sure everyone can fully participate in the meeting and to comply with the Americans with Disabilities Act (ADA) and [Section 508 of the Rehabilitation Act](#), meetings need to be accessible to people with disabilities. When choosing the venue for the meeting, keep in mind that attendees may have mobility, hearing, or vision challenges as well as cognitive, sensory, and other mental or physical needs. Consider how they will arrive at the meeting and participate throughout. Use this checklist as a guide.

Accessible Meeting Checklist

- ☐ Venue has access by public or specialized transportation during the meeting.
- ☐ Venue has a safe pathway to enter the building (accessible entrance, sidewalks, safe crosswalk, etc.)
- ☐ Venue has clear signage, directing participants to the building and to the room inside the building.
- ☐ Venue has ample accessible parking.
- ☐ Venue has a barrier-free entrance, hallways, doorways, and restrooms.
- ☐ Meeting space is located a reasonable distance from the building entrance.
- ☐ An animal relief area is provided for those using guide animals.
- ☐ Meeting space is well-lit and can accommodate those with mobility devices.
- ☐ Screen is viewable from all seating areas and sound is loud enough.
- ☐ Portable microphones are available and will be used by all speakers and participants.
- ☐ Materials are available in large print.
- ☐ Meeting invitations include instructions for people who need accommodations to participate such as materials in alternate formats, captioning or language interpretation including American Sign Language (ASL). Here is an example. "If you require any accommodations to fully participate or have any questions about accessibility, please contact [CONTACT PERSON] at [CONTACT INFO] by [DATE]."

- ☐ Vendors who can provide language interpretation (including ASL) and live captioning have been identified in case these requests are received.

Climate and Environment

In addition to choosing a meeting location that is easy to get to and accessible, it is also important that the general atmosphere of the meeting room is pleasant and comfortable. From the moment people arrive at the building, attention should be paid to helping them feel welcomed, safe and relaxed. This can also help them feel comfortable sharing their thoughts and ideas once the meeting starts.

- Choose a room large enough for everyone to fit comfortably, but not so large that it feels intimidating.
- Prepare a comfortable seating arrangement that encourages interaction and engagement, such as around a conference table. Leave enough room for people who use mobility devices.
- Use warm lighting and choose a comfortable room temperature.
- Offer refreshments that include healthy options and be mindful of dietary restrictions.
- Request all attendees wear name tags and/or use table placards.
- Have extra paper, pens, and agendas available.
- Build in a 15-minute social time prior to the official start of the meeting to allow participants time to get refreshments and mingle with each other.
- Utilize the Accessible Meeting Checklist to ensure accessibility.

Prepare for the Meeting

Preparations for a successful meeting start well in advance of the meeting itself. Spend time considering the following details to ensure everything runs smoothly.

- Get input from attendees to plan the day, time and location of the meeting.
- Develop an agenda with timing and do prep work for agenda items that require it. A sample agenda is provided.
- Provide materials and resources to attendees ahead of time to make sure everyone has a solid understanding of the topic and purpose of the meeting as well as expectations for their participation. Send the Meeting Agenda with the Introductory Letter (sample provided).
- Provide notice of the meeting at least 2 weeks in advance.
- Circulate a reminder of the event 24-48 hours in advance.
- Secure technology for playing the recorded video on a screen that is easily viewed from all seating areas, captions turned on and with sound loud enough to hear without difficulty. Make sure there is a portable microphone to use during the discussion.

- Arrange for any requested accessibility and language services (e.g., ASL interpreter).
- Gather meeting supplies: pens, paper, white board/flip chart, markers, sticky notes, name tags, sign-in sheet, etc.
- Prepare refreshments including water, snacks, cups, napkins, etc.
- Plan for onsite help for room set-up and post meeting clean-up. Arrive early and be prepared.
- Ensure directions to the building location are clear and signage is posted inside the building to find the meeting room. Consider having someone stand at the door to direct people.
- Designate a note-taker, someone who is not actively facilitating the meeting, to capture key discussion points and action items.

During the Meeting

It is the job of the facilitator to provide and maintain a positive, comfortable climate throughout the meeting. Consider asking one or two other people to help in case someone needs individual attention.

- Greet each person by name as they arrive and introduce yourself.
- Start the meeting with introductions and an [ice-breaker question](#).
- All speakers should always use a microphone. Don't assume someone's voice is loud enough to be heard by everyone.
- Provide an overview of the purpose of the meeting reiterating the expectations of the group.
- Establish ground rules for the meeting. Have 2-4 prepared and ask for additional suggestions and consensus. Typical ground rules include: raise your hand if you wish to speak, only one person talks at a time, be an active listener, etc. More ideas on ground rules can be found in the resources section below.
- Encourage all participants to share their thoughts and ideas by showing positive body language (smiling, nodding and good eye contact) and thanking people for sharing. Allow enough time for people to speak (count to five) after asking a question. Draw out quiet people by directly asking them to share if they are willing.
- Consider creating a non-verbal mechanism to gather everyone's input. One idea is to allow 3-5 minutes of brainstorming, asking each member to write 3 ideas on sticky notes and place them on a large poster to be read anonymously and grouped together. Another idea is to work in groups of 2-3 to collectively come up with several ideas to share as a group.
- Check in with the group regularly to make sure they feel the ideas and decisions being made are representative of the group.
- Start and end the meeting on time.

Sample Agenda

Location

Date - Time

15 minutes prior to start of meeting	Meet and Greet <i>Put on nametags, choose refreshments, mingle and greet each other.</i>
15 minutes	Welcome <i>Welcoming Remarks Meeting Purpose Expectations of Participants Ground Rules</i>
30 minutes	Participant Introductions and Ice Breaker
10 minutes	Break
60 minutes	Discussion <i>Use the discussion questions provided in the Discussion Guide to talk about transportation in your community.</i>
10 minutes	Break
45 minutes	Create an Action Plan <i>Build on the earlier discussion to determine what needs to happen next to continue working on community transportation. Develop an action plan using the template provided to organize the plan.</i>
10 minutes	Wrap-Up, Reflections, and Adjourn

Recruitment Strategies

Who Should Be Involved?

Participants of the community meeting should represent a variety of backgrounds and experiences. Ideally, the meeting should be made up of 8 to 12 individuals who represent the following sectors:

- ✓ Transportation providers
- ✓ Transportation users
- ✓ Community members who represent older adults, people with disabilities and caregivers
- ✓ Community organizations/human services agencies who serve older adults, people with disabilities and caregivers

Involving people with different perspectives will lead to a better understanding of the community context and therefore more effective solutions. As you select potential members to participate from the sectors listed above, also consider the following people:

- **People with Influence** – Look for people in the community who are respected and whose insights are valued including political figures, business owners, faith-based leaders or community advocates.
- **People Most Affected** – People who have lived experience are some of the most important people to engage with because the decisions made by the group will directly affect their lives. Include people who rely on community transportation programs as well as those who don't use the programs but could benefit from them.
- **People Dedicated to Helping Others** – Find other people and organizations in the community who have similar goals in making the community accessible to everyone.

As you connect with potential participants, remember to not only explain how their involvement will be helpful to the success of this project and the good of the community, but also how their participation will be beneficial to them personally or as an organization.

Recruitment Process

1. Brainstorm a list of people you know who might be interested in this project keeping track of the different sectors represented to ensure a well-rounded group. Ask co-workers for their input. Include as many people as you can think of with a goal of having 8-12 committing to attend the meeting.
 - Consider the agencies in the community who rely on transportation: healthcare/public health, aging and disability agencies, Chambers of Commerce, United Ways, faith-based groups, information & referral

- services, etc. Invite them as professionals to participate and also ask if they have customers who might be interested in participating.
- Consider people who are already involved in efforts to improve access in the community: advisory boards, businesses, neighborhood councils, local community organizations, etc.
2. Contact people using their preferred method of communication, understanding some people respond better to phone calls than emails, and some may prefer a text message.
 3. Explain the meeting purpose, process, and expectations of participants.
 4. Explain how their involvement will benefit them (or their organization) as well as the community. "What's in it for me?"
 5. Ask if they know of anyone else who might be interested.
 6. Focus on building relationships, even if they turn you down at this time, they might be willing to participate in future activities. Keep the list for future transportation-related work.

Workshop Discussion Guide

The beginning of the meeting should focus on helping the attendees get to know one another and become comfortable talking together. Choose ice-breaker questions that will be easy for people to answer and might draw out similarities in the group. Consider sharing an article, highlight a best practice or other current event that could help stimulate conversation. Then move the group to the topic of the day, improving community transportation.

Engage the group in a discussion about what is and isn't working when it comes to transportation programs in your community. Use the discussion questions below to facilitate the conversation. You do not need to use every question; pick some that fit your group best. Keep in mind that the discussion will culminate in creating an action plan to help move your community towards improved transportation options.

Discussion Questions

- What is our community doing well regarding transportation options?
- Are there transportation programs that are better utilized than others? Why?
- Are there transportation programs that are working well that could be expanded on or replicated?
- What are issues or problems people in our community encounter when accessing transportation? (Choose one problem to focus on.)
- What does your community look like? Think about the various neighborhoods. Is everyone able to access transportation?
- What are some solutions to address identified problems?
 - Describe what this community would look like in a perfect world.
 - What partners do we need to include in this work?
 - What resources and data do we need in order to move forward?
 - What are some barriers we may encounter? How will we address these barriers?
- How do we make sure this work on providing quality transportation options to the whole community continues to be a priority?

Tips for Facilitating Discussion

The facilitator's role is to create an environment that enables the group to share thoughts and ideas freely and make plans for next steps. Consider the following tips to aid in the discussion.

- Keep the discussion focused on the topic. Bring things back around if it gets off track, "Those are interesting points but let's stay focused on _____."

- Don't let the discussion about the issues or problems last too long. Acknowledge and record all challenges, then choose one or two specific issues to home in on. Lead the group into problem-solving to avoid a complaint session.
- Move the conversation along by summarizing what has been said, using facts and avoiding criticism or blame.
- Deal with conflict by talking about facts. Look for common ground and move the conversation forward.
- Pay attention to time. Ask someone to be a time keeper. Follow the agenda.
- Refer to the ground rules as needed. They are developed by the group for a reason.
- Consider having flip charts to record the main points in a way visible to the group. This helps keep things focused.
- Reiterate the importance of hearing from everyone and encourage all to share.
 - Provide structure for sharing by doing a round robin, breaking into small groups, or using sticky notes or other way for people to write their ideas which often feels safer than saying them aloud.
 - Gently call on people who have not shared and ask if they would like to add something.
 - If someone is dominating, kindly interrupt and say something like, "Thank you for those thoughts, let's hear from some others."
- Ask for feedback to find out if the group feels the discussion is going well.
- Make sure the group feels that the ideas and decisions are theirs, not just the facilitator's.
- As the facilitator, focus on asking questions, rather than providing answers, to create a space where genuine dialogue can emerge. Phrases like, "Talk more about that idea," "How would that look?" or "What do others think about that?"
- Thank people for sharing their time and ideas. Inspirational sayings about collaboration can be effective in helping people feel they are valued.

Creating an Action Plan

The discussion during the meeting should culminate in a conversation about what comes next. Use the ideas generated in the group discussion to create an action plan that lays out steps the group will take to improve transportation programs in the community. Developing a formal plan increases the likelihood of forward progress.

Why Create an Action Plan?

An action plan is a helpful tool the group can use as they work together to respond to a need in the community. The action plan helps the group organize their thoughts and ideas into tangible steps to address an identified problem. The overall purpose of an action plan is to provide a mechanism to document the steps necessary for change to occur. It holds the group accountable for completing agreed-upon activities. Use the Action Plan Template to guide the group through the following steps.

Steps to Creating an Action Plan

1. **Define the problem.** There may be several problems that arise but to start, choose one that the group can realistically undertake.
2. **Identify a solution.** Don't spend too much time talking about what's wrong, instead, focus the discussion on what a solution might look like. With input from everyone, choose a solution to focus on. If there are several good ideas, record them all but choose one to start with.
3. **Describe the action steps needed to achieve the solution.** Visualize what the ideal solution looks like, then define the steps needed to make it happen. Break the work into small steps that are clearly defined, reasonable to complete and measurable.
4. **Decide who will complete each action step.** Pay attention to people's strengths and availability. Try to spread the work out as much as possible.
5. **List deadlines for each action step to be completed.** Deadlines help ensure the project will stay on track.
6. **List the resources** that are needed to complete each action step.
7. **Define the desired outcome.** Describe what it looks like when the action step has been completed.

Once complete, make sure each participant has a copy of the action plan. The action plan is a working document and should be reviewed and revised regularly. Schedule ongoing meetings to keep everyone updated on progress and celebrate successes along the way. Use the action plan to keep everyone focused and accountable. Change can become a reality with dedication to meeting the goal, one action step at a time.

Action Plan for *[Community or Initiative Name]*

Identified Problem or Challenge: _____

Identified Solution: _____

Action Steps	By Whom	By When	Resources and Support	Desired Outcome
<i>What needs to be done?</i>	<i>Who will take action?</i>	<i>When will it be done?</i>	<i>What resources are needed?</i>	<i>How will you know it is completed?</i>
Action Step 1:				
Action Step 2:				
Action Step 3:				

Introductory Letter for Participants

<Host Agency Logo or Name and Address>

Dear _____,

Thank you for agreeing to be part of the <specific name of the meeting>. The purpose of this meeting is to gather people in the community who are involved in or interested in transportation to learn about and discuss our local transportation system, what's working and what could be improved to better meet the needs of everyone in the community. Participants in the meeting will include a variety of people including transportation providers, community service agencies, riders, and other community members who are interested in transportation.

The event will start with attendees getting to know each other before moving into a facilitated discussion about how well transportation programs in our community is working and how it can be improved. Finally, the group will develop an action plan, laying out the next steps that will be taken to improve the transportation options in our community.

As a participant of the meeting, you agree to contribute to the discussion and assist in developing an action plan to continue working on advancing transportation programs beyond the event. Details of the meeting are found below.

Date:

Time: [include start and end time]

Location:

Information about transportation to the event

If you require any accommodations to fully participate or have any questions about accessibility, please contact <name> at <contact info> by <date>.

If you have any further questions or concerns, please contact <name> at <contact info>.

Once again, thank you for your participation in this exciting event and your dedication to transportation for all members of our community!

Sincerely,