

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.