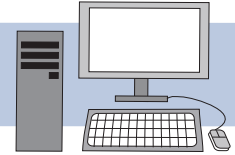
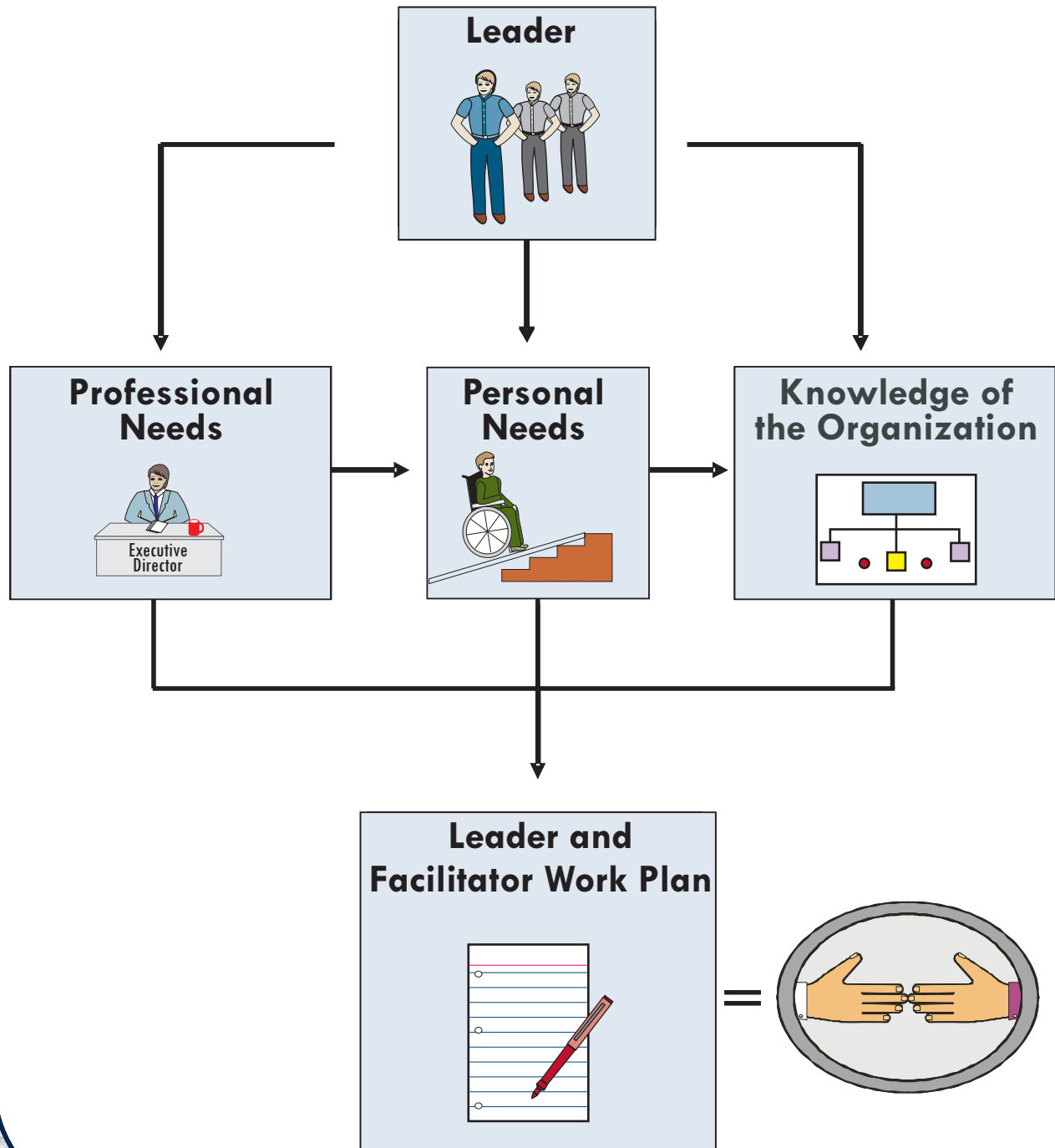


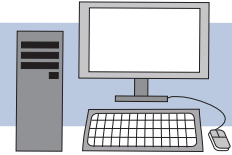
MEETING FACILITATION



Graphic Overview of Leader - Facilitator Relationship



FACILITATION SUPPORT



Meetings Page 1

A facilitator is a person that helps a board or committee member understand written material, discussion issues, and the rules of the Board

Facilitation practice assists diverse boards and groups ensuring that all members can participate equally. Numerous community groups, boards of directors and committees have created a mentoring culture, while others provide supports, called “facilitation”, to assist board members. These boards find that providing facilitation services is a helpful way to build an inclusive board.

A facilitator is a person that helps a board member understand written material, discussion issues, and the rules of the board. They help the member ask questions, express opinions and can also provide technical assistance to the board, making recommendations on how it can become more inclusive.

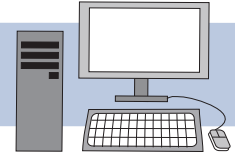
Facilitation supports are currently used with boards of disability service organizations. Many state-funded agencies are now required to appoint people with disabilities served by the agency to governing boards.

A board in Wisconsin developed a list of basic core values used to create a mentoring and supportive culture.

A Consumer Friendly Approach to Governance

1. Allow more board time to discuss issues or decisions, and less on organizational maintenance.
2. Discuss issues once, and then give people some time to think about them. Revisit the issues at the next meeting before closure.
3. Be more flexible regarding what is and is not “on point”.
4. To encourage full participation, promote an atmosphere of peer responsibility and peer accountability among all board members.
5. Mentoring is a positive dynamic for all board members.

FACILITATION SUPPORT



Meetings Page 2

**Successful Facilitation:
Develop a job
description that will
guide the facilitator in
their work with the
person.**

Questions to Ask

- What adaptations does the person need and prefer?
- What adaptations (if any) does the person use at work, at home and/or at meetings?
- Is the facilitator on the board's mailing list?

Preparing for the Meeting

How does the person review the packet? (e.g. *can read themselves, need to have it read to him or her, need the highlights pointed out at a preparation meeting, etc.*)

How does the person need to prepare their position or discussion remarks on action items? (e.g. *determine them on their own, need impartial assistance to identify pros and cons of each item to make decisions, etc.*)

How does the person speak to other self-advocates or self-advocacy groups to present a position that reflects their voice?

How will the person present their position at the meeting? (e.g. *need it written down in a way that helps them remember during the meeting, need to meet with you just before the meeting to remind him or her of opinions, etc.*)

Assistance during the meeting

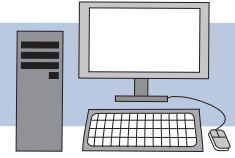
How do we sit at the meeting? (*facilitator at the person's side, in the audience, etc.*)

What cues are requested during the meeting? (*physical, pointing, verbal*)

How does the person prefer clarification during the meeting?

When do we review important board or action items that need to be completed by members? (*E.g. after the meeting, following week, etc.*)

FACILITATION SUPPORT



Meetings Page 3

Possible strategies for the person

Help the person attend an orientation and/or read and understand the orientation packet.

Assist the person in meeting with the organization's officers, executive director, or other members to learn about the most important issues currently being discussed and facing the organization.

Attend a Board or Committee meeting with the person before their term of office begins. Watch and discuss how the meeting operates to help the person fit in at board meetings.

Preparation work with the Board:

- With the person's permission, orient the Board.
- Clarify that the facilitator's role is to assist, not to speak for the person.
- Review adaptations needed by the person.
- Discuss inclusion attitudes and actions: the person is to be treated like anyone else.

Facilitator's observation of the person at board meetings:

- The number of times the person speaks on their own during meetings?
- The number of times the person speaks off-topic at meetings?
- The amount of time it takes the person to make their statement at meetings?
- Voting behavior matches what the person was prepared to do before the meeting?

FACILITATION SUPPORT



Needs and Interest Survey Page 1

Personal Needs:

Purpose of the Survey: To get to know the person and support what they may need. Not all information needs to be collected. These are life areas leaders with disabilities have found important to consider for good supports to be in place. They help insure successful participation at meetings.

DO YOU WANT SUPPORT WITH:	YES	NO	COMMENTS/DETAILS
Mobility			
Walking			_____

Helping with stairs and elevators			_____

Transferring in and out of wheelchair			_____

Opening doors			_____

Other			_____

Off Site Orientation			
Meeting room			_____

Bathroom			_____

Hotel Accommodations			
Making reservations			_____

Room accessibility requirements			_____

Location and mapping			_____

Locating others at the hotel			_____

Locating meeting rooms			_____

FACILITATION SUPPORT



Needs and Interest Survey Page 2

Personal Needs continued

DO YOU WANT SUPPORT WITH: **YES** **NO** **COMMENTS/DETAILS**

Medication

- Taking medication at meetings _____
- Reminders about taking medication _____
- Bringing/holding medication _____
- Reminder about mixing medication _____
- Alcohol interaction _____
- Other _____

Hygiene

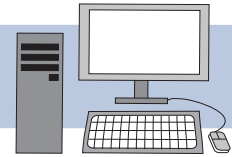
- What to wear to meetings _____
- Getting ready in general _____
- Using the bathroom (how?) _____

Transportation

- Arranging public/private/special _____
- Paying for transportation _____
- Waiting until ride arrives _____

Other Personal Needs not Listed

FACILITATION SUPPORT



Needs and Interest Survey Page 3

Professional Needs:

Purpose of the Survey: To get to know the person and support they may need. What the Leader might need from the facilitator to be successful and a contributing member of the group or board.

DO YOU WANT SUPPORT WITH: **YES** **NO** **COMMENTS/DETAILS**

Understanding How the Group Works

Ground rules _____

Voting procedures _____

Meeting structure _____

Remembering People And Their Jobs

Deciding What Is Important To Do In The Group

Which project to do first _____

Talking at meetings _____

Which projects or subcommittees to join _____

Reviewing/Reading Materials For The Meeting

Minutes _____

Agendas _____

Action items _____

Reading materials _____

Additional information _____

FACILITATION SUPPORT



Needs and Interest Survey Page 4

Professional Needs continued

DO YOU WANT SUPPORT WITH:	YES	NO	COMMENTS/DETAILS
Staying On Topic			_____

Remembering Things			
Meeting times			_____

Scheduling on the calendar			_____

Making phone calls			_____

Writing letters			_____

Obtaining information			_____

Completing the assigned work			_____

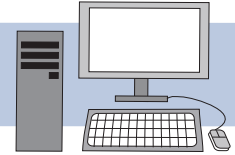
Bringing materials to meetings			_____

Phone Calls			
Dialing the phone, holding the phone			_____

Leaving messages on answering machines			_____

Helping others understand me			_____

FACILITATION SUPPORT



Needs and Interest Survey Page 5

Professional Needs continued.

DO YOU WANT SUPPORT WITH: **YES** **NO** **COMMENTS/DETAILS**

Putting Materials In Other Formats

Adaptations:

Large print _____

Graphics and text _____

Graphic only _____

Audio tape recorded _____

Computer disk _____

Braille _____

Sign language _____

Translation into native language _____

Easy-to-understand plain language _____

Printing on colored paper _____

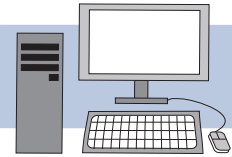
Note Taker

Write things of interest _____

Important meeting notes _____

Explanations _____

FACILITATION SUPPORT



Needs and Interest Survey Page 6

Professional Needs continued.

DO YOU WANT SUPPORT WITH: **YES** **NO** **COMMENTS/DETAILS**

Putting My Signature On Documents

Helping to sign documents _____

Sign my name with permission _____

Explaining what needs to be signed
(and how it will affect me) _____

Advocating When It Is Needed

Making sure the board provides
supports as promised _____

Standing up with and for me to
make sure there isn't any discrimination _____

Reminding people to treat all
people with respect _____

FACILITATION SUPPORT



Needs and Interest Survey Page 7

Professional Needs continued.

DO YOU WANT SUPPORT WITH:	YES	NO	COMMENTS/DETAILS
---------------------------	-----	----	------------------

Reading Materials

All materials read to you

Read with you

Put important ideas into pictures

Reading And Understanding Numbers

Showing numbers as pictures (chart/graph)

Writing numbers as words

Removing zeros (2,000,000 to -2-)

Rounding numbers off (2,567 to 2,500)

Talking about the numbers

Understanding the meaning of the numbers

Remembering Important Information

Members of the group

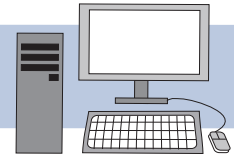
Things you have read

Important discussions

Questions you want to ask

Other:

FACILITATION SUPPORT



Working Together - The Partnership

Questions about prior board or committee involvement:

1. Have you ever been a member of a board, committee or advocacy group?

Which one _____

How long _____

What was your experience _____

2. Did you receive support, was it needed, was it helpful? Yes No

3. What is the best way for us:

Communicate between meetings _____

Work together at meetings _____

Make adaptations _____

AREAS THAT WE WILL WORK TOGETHER ON:

COMMENTS/DETAILS

Personal Needs

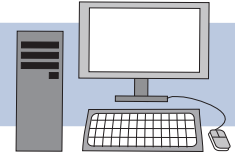
Professional Needs

Agreed:

Person

Facilitator

A MENTOR IS A GUIDE



To The Mentee:

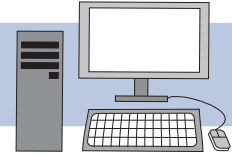
A Mentor should feel like an advisor, someone on your side; loyal, interested, trusted and experienced in areas that you may not be. A Mentor can almost be seen as an experienced friend. A Mentor leads by example and is a role model. A Mentor can help you see the big picture and understand the politics of the organization you need help with.

Few important things that will help you make the most of your Mentor.

1. Meet with them on a regular basis
 - a. Set clear objectives
 - b. Rely on them for guidance, not answers
 - c. Be honest
2. Using a Mentor is one of the best ways to develop yourself and not go it alone. A good Mentor will provide motivation and inspiration.
3. A Mentor can help you find ways to deal with immediate difficulties as well as help plan a long-term strategy.
4. A Mentor is a trusted guide; a tutor; a coach.
5. Board Mentors volunteer time to provide support to new members or members who need extra assistance. When Mentors are used with members with disabilities who need support, the relationship can encourage social acceptance and quality information sharing among board members.

The mutual help process provides an opportunity of increased communication between members outside of regular meetings. The experienced board member can share ways of adjusting to the demands of board participation and can prevent a new member from feeling overwhelmed and isolated. It's best when there is a group of Mentors available, so there are opportunities for relationships to develop.

SUCCESSFUL MENTORING



1. Identify personal boundaries and set ground rules

The board or committee sets realistic time commitments for the mentoring job.

When the mentor and mentee plan their time together, they should consider when and how often mentoring sessions happen, whether they happen by phone and/or meetings.

Mentors and mentees should interview each other to make sure that they would like to work together.

2. Define the learning goals of the relationship

Mentors can help mentees identify their learning goals that will support them at meetings. The more exact the goals, greater the chance of completion.

Agree on an Action Plan for each mentoring session.

3. Set up an evaluation for success

For Mentors

- Provide coaching and advice
- Share experience and knowledge
- Help with creative and independent thinking
- Listen, reflect, explore and explain - give positive advice
- Help be a connection for getting to know other board members
- Believe that the mentee can be successful
- Encourage ideas of success

For Mentees

- Are open to coaching and advice
- Share ideas and concerns
- Listen and ask questions to understand
- Know how to ask for what is needed
- Look for challenges
- Are interested in new experiences and learning
- Watch others and learn from their successes and experience
- Take responsibility for personal growth and development
- Clearly identify personal goals