



ENGAGING PEOPLE WITH
LIVED EXPERIENCE OF
INEQUITIES: MEETING
FACILITATION GUIDE

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Engaging People with Lived Experience of Inequities: Meeting Facilitation Guide

This meeting facilitation guide is an added resource from People with Lived Experience.

Previous resources include:

Engaging Community Members with Lived Experience: SCALE 1.0 Synthesis Report

Coleman S, Byrd K, Scaccia J, Stout S, Schall M, Callender S, Anderson J, Behrman N, Budnik A, Smith D, Brown L, Douglas W, Bussey R, McDermott E, Munene E, Mullin F, Hatchett L, Pohorelsky J, VanLanen T, Pairolo B, Mann Z. Engaging Community Members with Lived Experience. SCALE 1.0 Synthesis Reports. Cambridge, Massachusetts: Institute for Healthcare Improvement; 2017.

Engaging People with Lived Experience of Inequities: Relationship Building

Roary, Y., Rumala, B.B., Coleman, S.E., Knuckles, D., Turk, A., Glaze, E., Canedy C., FallCreek, S. Engaging People with Lived Experience of Inequities: Relationship Building. Implementation Guide. Cambridge, Massachusetts: Institute for Healthcare Improvement; 2020.

Engaging People with Lived Experience of Inequities: Assessment Tool and Resource Guide

Rumala, B.B., Coleman, S.E., Roary, Y., Canedy C., Turk, A., Knuckles, D., Glaze, E., FallCreek, S. Pre-relationship to Relationship Building Assessment Tool and Resource Guide. Cambridge, Massachusetts: 100 Million Healthier Lives, Institute for Healthcare Improvement; 2020.

“We are all in this together”

*-People with Lived
Experience*

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Purposeful Preparation

Meeting Preparation/Logistics

The way we bring individuals together to meet contributes to building or sustaining the community. Identifying clear and concrete meeting purposes allows for intentional design and for each member of the group to feel like they are part of the team. When engaging a new group of individuals, particularly people with lived experience of inequity, a necessary objective is to make sure that people feel safe, comfortable, and protected when they bring themselves into the space.

Bringing individuals together well before planning the meeting allows everyone to gain an understanding of what communities need in resources, location, and content for the meeting. Making spaces comfortable with food (including options for individuals with dietary restrictions), coffee and tea, when possible and being mindful of the location of the event so that it is accessible to individuals with different ability levels and bathrooms accessible to all genders, particularly trans and non-binary communities is an important part of recognizing the range of needs attendees may have. While it is not always possible to change the meeting location to accommodate these needs, bringing a ramp to make meeting locations more accessible to wheel-chair users, making signs to cover up binary bathroom signs, and making sure chairs and tables can fit individuals of different weights can prevent alienation and harm before content is discussed in an event.

Providing a checklist of needed accessibility features in advance of a planned meeting allows for proper accommodations to be made. This list should be a living document that can be updated as new team members join the group or circumstances and situations of team members change.

One checklist, is shown below:

- Accessible Location
 - By public transit, walking, and biking
 - Near: (participants fill in blank)
- Captioning
- Language Interpretation
- Assistive listening devices
- Slides with large print
- Reserved seats in the front row
- Wheelchair access to seats and working tables throughout the room
- Scent-free room
- Lactation room
- Gender neutral bathrooms
- Dietary restriction list
- Assistance with travel specific costs
- Straws for beverages
- Venues that have space for service animals
- Disclosure of proximity to law enforcement
- Other: (participants fill in the blank)

While your team may not be able to make all of these specific accommodations, having an increased awareness of what your participants need can allow for creative solutions and clear communication of expectations. For example, you may not be able to have a language interpreter at an event, though you could ask your community to see if someone is able to follow up with the individual in a language they understand. This allows for your participants to understand what to expect during the convening and know if their needs can only be partially met. If these accommodations cannot be met for a specific meeting, it can provide insight into what to look for in future venues and locations or provide potential suggestions for ways to build a more accessible community space.

In person Meeting/Logistics Prep:

Virtual Meetings:

You may think that webinars are a more accessible way to host a meeting since individuals are able to attend from the comfort of their own home. While this eliminates some concerns of accessibility it can at times create others. For example, if an individual doesn't own a personal computer, they may need to have a meeting during a time where a library is open and sound transmission is not an issue. If English is not someone's first language, they may require an online platform that includes closed captioning. Time zones and government restrictions on internet usage can prevent someone from

being able to access the meeting. In general, for online meetings some of the most important things to plan for are:

- Recording content and having opportunities for individuals to continually engage with both the community and organizers
- Rely on verbal, chat function, and non-verbal icons for communicating within the webinar
- Include rest periods during longer calls
- Gain group consent on pace of content (avoid moving too quickly)
- Do not overcrowd slides with information
- Use clear readable colors
- Provide less content and more time for processing and conversation
- Include opportunities for feedback from individuals

Having an understanding of what needs other individuals may bring into the meeting is vital developing in brainstorming creative accommodations for participants and providing more accessible webinars.

Virtual Meeting Prep Resources:

- [Designing and Delivering an Accessible Webinar](#)
- [Making Presentations Accessible](#)
- [Platform Accessibility Cheat Sheet](#)
- [Making your Webinar Accessible - Blog](#)

Agenda Building

Pieces of an Agenda:

Similar to planning the logistics around the meeting in collaboration with attendees, including feedback and perspectives in the design of the agenda is crucial to making sure everyone's voices are heard in a meeting. The foundation of any long-standing collaboration should begin with an understanding of what all audiences would like to get out of the meeting and how familiar audience members are with one another. This impacts how much time different sections of an agenda should be covered. Broadly speaking meetings tend to have five "sections to an agenda":

1. Icebreaker (Getting to know one another outside of the work): Ice breakers are questions, prompts, activities, etc. that work to bring people closer together beyond the work. Icebreakers build community and allow individuals to feel more comfortable with one another. Typically, ice breakers occur during the beginning of the meeting, though they can be utilized at any time to refocus the group or allow for a break from content.
2. Norm-Setting (basically establishing the "rules of engagement" in a meeting - what behavior and intentions would we would like to see in the space): Norm-setting gives participants the opportunity to state how they would like to relate to others and create boundaries on how they would like others to relate to them. Norm setting allows for each participant to contribute the intentions they would like to bring into the space. For example, a norm would be that as a group, we trust that we all hold a piece of the puzzle and we need each other's pieces to understand the whole picture.

3. Context-setting (who is in the room and what is their role): Context-setting allows for all relevant information to be shared about the purpose of the work, organizations/parties involved, and people in the room. This includes everyone having a thorough and shared understanding of the meeting purposes and enough information about the other attendees to be able to connect and collaborate
4. Content: If your agenda has a purpose in addition to building community, the content piece allows participants to engage and fulfill that additional purpose. Collaborative meetings allow participants to use discussions to build out content and make decisions and are less of a lecture.
5. Discussion/Conclusion: The final portion of the agenda leads individuals to understand what next steps are needed to fulfill the overall aim of the work. As the meeting ends, this allows participants to include their own asks of the space and offers to the space to bring community members closer together through the sharing of existing resources.

If the purpose of the agenda is for individuals to get to know one another, the group could spend the entire meeting doing activities to learn more about who is in the room. If a group is already established, they could spend the entire meeting on next steps and planning action items. Facilitated meetings aren't lectures and the purpose of the meeting is to hear from new individuals as well as seasoned participants or team members. These guidelines are created to sustain a longstanding collaboration between individuals. If the intention of relationship building is to create a temporary partnership, having a longer call to build the relationship is still crucial and it is important to be intentional when gradually moving towards fulfilling additional purposes.

Facilitation template for an hour-long meeting (based on level of relationship):

Agenda section	Early relationship	Steady Relationship	Thriving Relationship
Icebreaker	15 min	15 min	10 min
Norm Setting	20 min	10 min	5 min
Context	15 min	5 min	5 min(if needed)
Content	5 min	10 min	10 min
Discussion/Conclusion	5 min	20 min	30 min

Meeting Facilitation

Many individuals confuse facilitating with many other types of hosting a meeting. The book '[Unlocking the Magic of Facilitation](#)' is available for sale as a paperback or for a donation as an e-book. This pay- what-you-can resource that shares distinguishing features of facilitation. The book defines facilitation as “a style of engaging others toward a goal” and differentiates between facilitating, lecturing, and teaching. Facilitation is a powerful tool compared to lecturing and teaching since it allows for all members in the community to be vulnerable and grow while reaching the established goal together. Facilitation is also a skill in using language to balance the needs of individuals within a group while respecting the dignity of all individuals who are in the room.

Facilitators are in charge of monitoring the group to make sure all participants feel safe, preventing harm for all individuals within the room, and creating a learning experience and communal healing if a harm happens within the space. When an event is facilitated well, it allows participants to feel renewed, energized, and a part of something bigger than themselves. Facilitating is learned best from

trying, receiving feedback, and continually adapting to the needs of your community. Facilitators are neutral parties in the discussion and solely move the conversation forward. Facilitators are a safe person for individuals with lived experience if harm happens within the space and it is the facilitator's responsibility to be aware of potential harm that could happen within the space.

Consensual Facilitation:

Each facilitator uses their own style in facilitating a meeting. When you're in the early relationship phase of a collaboration, consent is the most important piece of facilitation so that everyone feels comfortable and confident in the overall direction of the conversation. Consensual facilitation asks attendees how they feel both about what has been said within the space and in the direction of the overall agenda. Sometimes this includes discussing information outside of the agenda, pausing a conversation for internal processing, or extending a meeting if the energy in the room has more to say. Asking what the group would like and allowing for the group to move in the direction it needs to go in, allows for meetings to move into the discussion that the group needs to have. When using consensual facilitation, establishing a process to make decisions and communicating it to the group can be useful.

Some decision-making options:

- Consensus: a decision is made when everyone agrees
- Majority: A decision is made when a majority agrees
- Two-thirds, three-fourths, etc.: a specific proportion of attendees is needed to make a decision
- Lived Experience: Individuals with lived experience in the space make decisions (using the above criteria as needed)

Regardless of what decision-making criteria you decide to follow, it is important that individuals with lived experience have a leadership role in crafting the direction and outcomes of all decisions. For example, when you do not have the consent of individuals with lived experience to move forward it is important to prioritize this over other needs.

Norm-Setting:

It is up to the facilitator to decide if they prefer to bring a list of norms into a meeting or allow for individuals within a room to co-create its own norms. Although many individuals may not have had experience with norm-setting, generally, asking the group what norms are needed to feel comfortable and safe within a space is a good place to begin this conversation. This includes asking things like:

- What makes you feel safe within a discussion?
- What intentions are you bringing into this space?
- How would you like for others to communicate with you?
- What are your fears in having this discussion?

Mitigating discomfort through meeting norms can prevent unnecessary conflict or reduce it when it occurs and create a set of guidelines to hold the community accountable to itself. Norms should be revisited frequently and if possible, posted at every meeting. They should be updated based on feedback from the group. If individuals are not ready to contribute ideas about norms or haven't offered many ideas have not contributed many ideas into the space referring to sharing a premade list of norms and seeking feedback from the group about the list can help encourage the process. One An example list of norms used in the 100MLives People with Lived Experience Co-Leadership Team is included here:

1. Everyone has a voice
2. Everyone is an equal stakeholder in contributing in co-leading and co-designing
3. There are no hierarchies
4. Everyone has expertise through both formal or informal channels

5. Bring forth your lived experiences to the conversations and solutions
6. Be present as fully as possible. Speak your truth from your hearts and minds.
7. Listen generously to each other's truths
8. No shame, embarrassment, or judgment
9. Trust that we all hold a piece of the puzzle and we need each other's pieces to understand the whole picture
10. Embrace differences and be open to learning from each other
11. Help each other to have the confidence to spread our wings, be creative, and take on new roles
12. Allow our ideas to be developed further by others
13. Accept that we will sometimes have challenges, but we will learn together and move forward

Group Activities

There are many different ways to engage with a group during a facilitated discussion. The most traditional version is through having a full group discuss ideas, contents, or initiatives. This is great when working to solicit specific feedback from a cohort or to gain a better understanding of both parties' intentions. Some other types of activities are:

- Breakout Groups: If the group is quiet, this is a great option to get individuals talking in a more comfortable environment. Breakout groups are great for covering a lot of material in a short amount of time. Breakout groups can also be used as consensus building within specific cohorts of individuals.
 - Bringing in objects: Sometimes objects, photos, music, and other non-traditional items bring back memories or inspire ideas for individuals. Having objects like pipe cleaners, coloring pages, and play dough can give individuals something to passively engage with while listening. Bringing objects related to the agenda can be a tool in exploring controversial topics in a non-confrontational manner. Setting aside time in the agenda for participants to observe items can allow for spaciousness in processing and give participants the opportunity to lean into their own perspective. This could include a photo of a land before an apartment complex was developed in a conversation focused on the impact housing complexes have on a community or a hot comb when exploring the impact of colorism in communities of color can be used to intentionally process communal harm and implicit beliefs about self and community.

When facilitating a hybrid online and in-person event, it is important to have facilitators and activities both for the in-person activities and virtual pieces of the activity.

Theory to Practice: People with Lived Experience Co-Leadership Team

Facilitation utilizing The Community of Solutions (COS) Framework, Touchstones for Collaboration, and Habits of the Heart has been at the core of meeting facilitation within the People with Lived Experience Co-Leadership Team.

In Roary, Rumala, Coleman et al. (2020), the authors further contextualize the original COS framework developed by Stout (2017) and expand on its application for the relationship building process for local and global communities. In this expansion, Roary, Rumala, Coleman et al (2020) emphasize the following:

Leading from Within (LW) for Relationship Building: This concept involves the inner journey of a leader in health equity work. Self-awareness of individual strengths and areas for growth allows for people to demonstrate vulnerability and can unlock the leadership potential of others. In Leading from Within communities learn over time to approach work from a place of abundance, even in the midst of scarcity. Honoring an abundance mindset helps illustrate the value in our collective diversity. Knowing oneself and what inspires people to leadership (including biases and areas for potential growth, or, “growing edges”) is essential. This process opens groups up to humility. At times this means using instances of perceived “failure” as an opportunity to grow. When individuals learn from what could have gone better, they are able to embrace change and lead through individual vulnerabilities (Leading Together).

Leading Together (LT) for Relationship Building: We are all in this together, and the work is more rewarding as relationships deepen and as we understand the mutuality in this work. Leading Together skills are grounded in a perception of the community as a dynamic network of people, organizations, structures, and systems that are linked to a place. It is necessary to lead together with all individuals who impact or are impacted by a community to create effective, equitable change.

Elements of Leading Together

- Developing trust
- Building relationships and interconnectedness
- Effective teamwork,
- Inclusive collaboration (including creating a “brave space” for collaboration)
- Asking open and honest questions

Each of these elements impacts the relationship building journey and will be utilized often as your collaboration efforts increase.

Part of Leading Together is honing facilitation skills to cultivate the leadership of others. As relationships grow, communities find greater ability to have difficult conversations when needed. Each of these elements engenders an appreciation of the value of differences. Through this piece of the framework, communities may gain an ability to be at peace with potential conflict, which ultimately leads to growth. This is called holding tension in life-giving ways. Community members who are part of this process each have a sense of personal voice and agency from the Leading from Within skills, and build capacity to create community and accomplish sustainable outcomes together.

Leading for Outcomes (LO) for Relationship Building supports communities in applying design thinking skills to co-create a theory of change. This includes identifying measures, testing theories, and planning for implementation and scaling up in a way that makes these tasks easier. In the pre-relationship LW and LT phases, we are frequently learning about our stories and listening to understand solutions within people's lived experiences. While LO utilizes design thinking and implementation science skills, these tools will result in less meaningful results without strong foundational work in LW and LT. Basing the work in relationships creates solutions through knowing people's stories, and we can test interventions that are actually meaningful to the people who need them the most. Getting to results and outcomes is one of the best ways to build lasting bonds and relationships with people. Having the satisfaction of accomplishing change together keeps communities progressing forward and ultimately leads to Leading for Sustainability.

Leading for Equity (LE) for Relationship Building focuses on health improvement for those who need it the most while also addressing equity at a structural level. Equity is defined as a set of conditions in which all people have the opportunity to attain their highest possible level of health and well-being, without barriers that prevent them from doing so. In the Community of Solutions model, it is nearly impossible to Lead for Equity without the pre-relationship building steps developed through LW and LT. The time devoted to the pre-relationship stages with people with lived experiences ensures that our communities are addressing equity in a meaningful way and designing solutions that make sense for those most impacted by inequities.

Leading for Sustainability (LS) for Relationship Building facilitates an ongoing process of transformation in a community through four key elements: environmental (physical, political, cultural), resources (intrinsic will for change, financial support), people (cultivation of leaders), and change (growth in the change process). Our level of relationships with people and communities' influences all of the elements within LS. Building strong relationships is a significant ingredient of sustaining our work together. Health improvement work that started as a new idea or project may actually transform into a practice or policy. Our goal in LS is to transform the work further into larger and lasting systems change, something that will never happen without foundational pre-relationship work with people with lived experience.

In Rumala, Coleman, Roary et al (2020) the authors further expand on the importance of the meeting facilitation process as part of an assessment and resource guide that individuals and organizations can use to plan next steps on engaging people with lived experience of inequities.

The People with Lived Experience Co-Leadership Team has been centered around a strengthening of the important stage of relationship building as part of Leading Together from an equity framework. This has involved ensuring that there is co-design of the meeting agenda and input from stakeholders, checking in as our whole selves and discussing and addressing inequities that arise from a solutions framework. During the facilitation of our meeting, voice is also taken into account to ensure that are part of the participatory process of co-design and co-leadership. Our framework has been centered around a slightly modified version of the 100 Million Healthier Lives Touchstones for Collaboration.

Touchstones for Collaboration:

- Everyone has a voice
- Everyone is an equal stakeholder in contributing in co-leading and co-designing
- There are no hierarchies
- Everyone has expertise through both formal or informal channels
- Bring forth your lived experiences to the conversations and solutions

- Be present as fully as possible. Speak your truth from your hearts and minds.
- Listen generously to each other's truths
- No shame, embarrassment, or judgment
- Trust that we all hold a piece of the puzzle and we need each other's pieces to understand the whole picture
- Embrace differences and be open to learning from each other
- Help each other to have the confidence to spread our wings, be creative, and take on new roles
- Allow our ideas to be developed further by others
- Accept that we will sometimes have challenges, but we will learn together and move forward

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