Facilitating meetings with people with lived experience of inequity

During the first months of SCALE, a number of SCALE communities worked on the skills needed to bring community residents, some of whom may never have been inside a conference room, into the environment of a SCALE meeting. As it turns out, there's a great deal of overlap between what's needed to engage folks at all levels of readiness for the boardroom, and what's needed to engage partners from multiple areas, agencies and organizations, with different priorities and areas of focus. SCALE communities developed flexible, deeply collaborative strategies, a mix of activities and discussion to avoid having a single voice dominate, and cultivated a (mostly) jargon-free environment where it was safe for anyone - no matter their background - to ask for information, clarification or context. Partners talked about their SCALE community meetings as being motivating, and deeply collaborative meetings. And, they had fun! We hope that you will, too.

Note: This is a living document! We hope we'll all get a chance to learn something from each other, as well as paying it forward. Please add your tips, or add a note to an existing tip. Remember to tell us WHAT you do, and WHY.

Some topics to consider:

- *Starting the meeting: how do you set up your meeting so that all are engaged and present?*
- *How do you reach consensus?*
- *How do you deal with terminology that different people use differently? (Even "community" can mean different things to different people)*
- *How do you manage a topic that has context that needs to be explained to new members/community champions?*
- *How do you have difficult conversations?*
- *How do you encourage differing opinions?*
- *How do you manage conflict? Differing priorities?*
- *And whatever else has come up in your meetings. Thanks!*

Understanding concepts, language, methods:

- With complex topics, we explained them in the meeting before we moved on to make sure that everyone was on the same page. Twice a month, we met with the community members with lived experience of inequity separately to prep them for the steering committee meetings, assist them with any pre-meeting homework, make sure they understood everything that was happening, etc. After a while these needed to happen less frequently.
- Ensuring that the tools we are presenting and using are clearly explained (Plan-Do-Study-Act cycles, etc) and everyone's input counts in that process.
- Use jargon cards (cards with a question mark on it), and explain jargon. People from different agencies or organizations may use terms differently, and it's important that everyone is on the same page. Use plain language instead.
- Use people first terms, to avoid labels. People aren't "homeless," they are people who are experiencing a loss of housing. This is more respectful, and focuses us on the people who are struggling with the issue.
- Don't rush - check for understanding always before moving on.

Strong team, strong engagement:

- Provide meeting agendas and meeting notes in a timely manner, allowing ample opportunity for team members to add agenda items.
- Be alert for us vs them ways of thinking and talking. Stop it if you hear it in someone else. Encourage everyone to call this out if needed. Practice mindfulness around language used to describe the target

population.

- Ask the community residents for their input. Many community residents will wait for that invitation before they speak.
- Be aware that some people may not feel comfortable in a room full of professionals, and will need support to be the only lived experience voice in the room. Check in with them. See if they have questions before and after the meeting. Slow the pace of the meeting down if needed. If they are not talking, ask for their thoughts. Validate their unique contributions; tell them and others why their insight is helpful.
  - Note: verbally appreciating others' contributions, and explaining what you are learning from them is a good habit for the group in general. The more we value every voice, the more we encourage all to speak.

Creating an environment of continuous learning:

- Always look to learn. Don't assume that you know; always ask questions and look to learn, and guide the rest of the team to do the same. If you hear people making assumptions, invite the group to think more about the situation. "What do we know about this?"
- Questions are powerful ways to learn, but many people (not just the community residents with lived experience) will hesitate to ask. Encourage them to ask, so that all can learn.
- Use Open, Honest questions, so that you aren't shaping the question in a way that limits the answer, but can learn more than what you expect.
- Try silent brainstorming, asking everyone to take a moment to reflect on an issue, then to contribute their thoughts. Options for this include: postie notes, a shared Google doc, or putting ideas into chat (if on videoconference). By having people share their ideas simultaneously, you avoid groupthink and allow all voices to be heard.
- Mix it up! Try breaking people into small groups, combining team members who may not otherwise work together. Ask people to report out to the larger group.

Keeping the community & your learning present:

- Hang up the things you've learned from the community!
  - Use a process map to make it easy for everyone to see a process
  - Experience maps help understand the experience with a process or system
  - Personas help keep the team grounded in the humanity of the work.
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Meeting elements:

- We review the Circle of Trust Touchstones prior to meetings- taking turns to read each one aloud.
- Keep Team Norms posted at the top of each agenda as a reminder of how we work together as a group.
- Use touchstones that describe the way the team works, core principles. Review at every meeting. This helps the team remember how we agreed to work and relate to each other. This helps with conflict and with encouraging differing opinions. When the group gets derailed you can refer people back to these so it feels less personal.
- For groups with members with differing - and sometimes opposing - priorities and perspectives, it's helpful to build the touchstones/team norms together. A lot of learning about how to work together goes into coming to agreement on touchstones and team norms (how we'll work together)! By reviewing these at the start of each meeting, we can touch base with that shared work.
  - Tip: use postie notes. Give 2-3 postie notes to each person, and ask them to write something about what's needed to work together. You might want to give an example, such as, "embrace different opinions. We need all of our perspectives and contributions to do this work. When the going gets tough, turn to wonder. Ask questions to learn about and better understand what the other person is saying."
- Start by reviewing the goals of the meeting. This helps us get focused on the work we're doing at that meeting.
- We always had snacks. Food helped relax people and encourage casual conversation at the beginning

and throughout the meeting.

- Consider ending your meetings with a plus-delta discussion, where the team makes a list of things that went well & people they want to thank (plus), and the things they'd like to change (delta). This gives the community champion/community resident with lived experience a chance to voice what they find challenging in participating in the meeting. Hearing that, allows the whole team to adapt - not just the facilitator.

Difficult conversations & conflict:

- Recognize that conflict is healthy and expected in groups. It brings expression of diverse viewpoints, bringing innovation and learning to the team. Ask clarifying questions to make sure you understand what a team member is trying to communicate. Take time to appreciate that someone shared a differing view point. Reflect back the words being said and invite all to take time for silent reflection.

Making decisions:

- We used both of these tools to make decisions (descriptions taken from http://www.mainstreet.org/main-street/main-street-news/2000/07/facilitating-meetings-part-ii.html):
    - "Red Light, Green Light" voting. Each participant is given a set of three colored index cards: one is red, one yellow, and one green. When it's time to decide on an issue, the facilitator asks each person to display the index card that most appropriately describes his or her opinion about the subject. If participants adamantly oppose the idea, they hold up the red card (signaling "stop!"). If they like the idea and are comfortable with endorsing it, they hold up the green card (go!). If they don't know, need more information, or feel cautious about the subject, they hold up their yellow cards (caution). This quick show of colors allows the group to determine whether to discuss the issue further or move on.
    - Sticky dots. This method is great when you want participants to identify their preferred items from a long list of information. It can also be effective in more controversial situations as there is a fair amount of anonymity in attaching dots to things. Participants are given a specific number of round labels which they can stick on their top choices, highest priorities, etc. (Items need to be written on flip charts for this to work!) Sticky dot methods vary according to the desired outcome, the type of meeting, and the number of items on which participants can vote.
        - Note: if you ask people to vote for their top two choices, rather than their one top choice, then they are less attached to a single outcome.
- When you have people with differing priorities in the room, phrases like, "can we all live with this?" invite people to look for a decision that is manageable, rather than one that is ideal.