FACILITATION



PURPOSE – PLANNING – PRACTICE

Facilitation Plan

All members of boards, committees and councils must be able to participate equally and make informed decisions. It is important that members who need assistance on a board, committee or council be encouraged and made aware that accommodations are available to enhance their participation.

The following worksheets are designed as a self-survey that addresses a range of facilitation support needs to help identify the type and amount of support that may be useful. The worksheets are designed to be completed by the member and facilitator. Discussion by the facilitation partners is an important component of the self-survey. It provides an opportunity to learn how the team will work together and best ways to provide support.

Facilitation Worksheet Facilitator and Member to complete.

Organization:

1.	Does the organization have a job description for facilitators? (If so, review)		
2.	Can the organization or meeting leader add the facilitator to important mailing lists?		
3.	What adaptations does the member currently use at work or home?		
4.	Would these adaptations be useful at meetings? (Which ones)		
5.	How will personal care needs be met, if required?		
6.	Is there specific support the member wants? (List)		

Facilitator and Member to complete.

Personal Needs:

1.	Mobility (walking, help with stairs and elevators, transferring in/out of wheelchair, opening doors, etc.)
	Support I want:
2.	Meeting Site (location, contact information, meeting room, bathroom) Support I want:
3.	Transportation (making arrangements) Support I want:
4.	Hotel Accommodations (accessible room, locating people, meeting room, etc.) Support I want:
5.	Food and Drink (assistance with meals, eating or drinking) Support I want:

Facilitator and Member to complete.

Personal Needs:

6.	Medication (reminders to take, and medication effects) Support I want:		
7.	Personal Appearance Grooming Professional Image Hygiene		
	Support I want:		
8.	Bathroom Assistance (opening doors, transferring, etc.) Support I want:		
9.	Transportation (arranging: public, private, special) Making arrangements Paying for transportation Waiting until ride arrives Support I want:		
10.	Other: Support I want:		

Facilitator and Member to complete.

Member Duty Needs:

1.	. Understanding organization's structure and process		
	 ☐ How meeting is run, Robert's Rules ☐ Review by-laws or operating rules ☐ How members communicate with each other and make decisions ☐ How the meeting makes decisions 		
	Support I want:		
2.	Reviewing materials for the meeting		
	☐ Minutes		
	Agendas		
	Action items		
	Other materials in packet		
	Support I want:		
3.	Speaking up		
	Talking about ideas before meetings		
	Highlighting main points to talk about		
	Preparing statements, reports		
	Support I want:		



Facilitator and Member to complete.

Member Duty Needs:

4. Asking questions and making comments			
	 Writing down questions or comments to bring to meetings Making sure my points get across to the group Remembering at the meeting: ask my question make my statement 		
	Support I want:		
5.	General Reminders Completing calendars, meeting dates and times Making phone calls and writing emails		
	Getting information		
	Completing assigned work Bringing materials to meetings		
	Support I want:		

Facilitator and Member to complete.

Member Duty Needs:

6.	Making materials understandable Adaptations: large print pictures and text pictures only braille language translation plain language: easy-to-understand words
	Support I want:
7.	Reading materials Turning pages, highlighting main points Writing summaries Reading materials aloud Explaining hard-to-understand language Explaining acronyms or new terms
	Support I want:
8.	Taking notes Writing down important points, actions, decisions Take notes on paper or a computer Explaining notes Support I want:

Facilitator and Member to complete.

Professional Needs:

Do you want help with:	YES	NO
UNDERSTANDING HOW THE GROUP WORKS		
Ground rules		
Voting procedures		
Meeting structure		
Remembering people and their jobs		
Staying on topic		
DECIDING WHAT IS MOST IMPORTANT TO DO		
Which project to do first		
Which projects or committees to join		
REVIEWING OR READING MEETING MATERIALS		
Minutes		
Agendas		
Action items		
Additional information		



Facilitator and Member to complete.

Professional Needs:

Do you want help with:	YES	NO
REMEMBERING THINGS		
Meeting times		
Scheduling the calendar		
Making phone calls		
Writing letters		
Finding information		
Completing assigned work		
Bringing materials to meetings		
COMMUNICATION		
Using the phone		
Leaving messages		
Helping others understand me		
Sending or receiving emails		
Printing emails		



Facilitator and Member to complete.

Professional Needs:

Do you want help with:	YES	NO
DOCUMENTS Signing documents Signing my name with permission Explaining what needs to be signed (and what the document means)		
READING MATERIALS Reading materials aloud Reading together during prep time Putting important written ideas into pictures		
UNDERSTANDING NUMBERS Showing numbers as pictures (chart/graph) Writing numbers as words Removing zeros, rounding off Understanding meaning of the numbers		
REMEMBERING IMPORTANT INFORMATION About members of board, committee, council Things I have read Important discussions Questions to ask Comments to make		
Other:		



Facilitator and Member to complete.

Partnership:

The best way	y for us to:
--------------	--------------

Communicate between meetings
Work together at meetings
How do we sit at meetings? (at the person's side, in the audience, etc.)
What kind of cues to use during the meeting? (physical, pointing, verbal, writing)
How will the member present positions/statements at meetings? (speak independently, with assistance, read member statements)
Make adaptations



Facilitator and Member to complete.

Sum	mary	Page:

Personal Needs:	
Member Duty Needs:	
Professional Needs:	



Facilitator and Member to complete.

Agreement

As partners we will communicate openly and honestly with each other.

As the member, I agree to:	As the facilitator, I agree to:
a. Work as a partner with my facilitator.	a. Work as a partner with the member.
b. Communicate when I have questions or concerns about facilitation.	b. Communicate when I have questions or concerns about facilitation.
c. Be prepared and professional.	c. Be prepared and professional.
d. Communicate when I need to change my plan.	d. Respect confidentiality of the member.
	e. Other
e. Respect confidentiality of the facilitator.	
f. Other	
signature (member)	date
signature (facilitator)	date
signature (organization)	date