# Facilitation Tips for Advisory Board Meetings

This document provides general strategies for use with members during advisory board meetings, whether for purposes of ongoing training or advising researchers. These tips are based on the experiences of the Bureau of Sages, Sages in Every Setting research advisory boards, and existing resources on group facilitation and communicating with older adults. To find more concrete techniques for how to foster meaningful exchange during meetings, see the "Guidelines for Research Advisory Board Meetings." For examples of the types of questions and statement that facilitators can use to manage discussion, see "Sample Discussion Prompts." To learn more about facilitating and communicating with older adults and nursing home residents, see the "Facilitation Resources."

***Build confidence, mutual respect, and trust:***
- Develop individual relationships with members
- Validate what members say
- Acknowledge the value of different views and experiences
- Support group decision making by identifying steps or summarizing consensus
- Provide examples of challenges that researchers encounter
- Seek honest feedback from members about the advisory board experience
- Providing brief, concrete examples of research and how the groups' feedback has been used
- Talk about how research studies and changing the way research is done can take a long time
- Keep members interested by meeting regularly to discuss/learn about research

***Accommodate older adult learners and those with physical, sensory, or processing limitations:***
- Provide a physical space that is comfortable, without background noise or interruptions
- Promote discussion and provide concrete examples; <u>avoid</u> lecturing.
- Repeat learning activities; <u>avoid</u> asking members to recall prior learning
- Use plain language; <u>avoid</u> or rephrase jargon or technical terms
- Restate member comments that were hard to heard or understand
- Test/use multiple technologies to enable two way communication (microphones for both guests and members, speakers, assign a person to transcribe the dialogue in large fonts)
- Follow accessibility and age-related guidelines for written materials, slides, graphics, online formats, etc.)

***Facilitate productive discussions***:
- Briefly remind members of the purpose of the advisory board at the beginning of each meeting
- Clearly state your role—to make everyone has a chance to contribute and understand
- Be sensitive to members' perceptions of or feelings about research, researchers, health care or providers;
- Manage "off task" dialogue and personal concerns (See "Sample Discussion Prompts")
- Reframe personal experiences or concerns as "ideas" for research topics, interventions, outcomes, etc.
- Stay in the role as facilitator; be conscious of your own body language or behavior
- Know your own assumptions; <u>avoid</u> asking members (or researchers) a question that leads to answer you expect or hope for (See "Sample Discussion Prompts")

***Support researcher communication with members:***
- Ask researchers to share their topic, plain language summary or discussion questions prior to the advisory meeting
- Encourage researchers to facilitate the discussion with members
- Model how to facilitate if the researcher is having difficulty; use the techniques listed above to "show" how to enable productive discussion
- Recap a discussion and ask for additional thoughts from members
- Ask researchers what they learned for members and how they will use that input
- Encourage researchers to come back with updates on their research or results

***Maximize communication during online meetings:***
- Ask researchers to designate an extra person to troubleshoot technology and/or work as a behind the scenes facilitator.
- Use an online format that shows a large visual of the presenter when speaking.
- Provide multiple options for members to be seen and heard (speakers, large screens, microphone for facilitator, extra microphone for member who is speaking, hearing amplification devices for those with hearing impairments)
- Be flexible and ready to come up with workarounds!