



Guidelines for Research Advisory Board Meetings

Developed in discussions with the Lieberman Community and Virtual Senior Center Bureaus of Sages, based on the Value Statement.

FOR PARTICIPANTS

When listening...

- Pay close attention.
- Be patient. Allow time for silence and thinking.
- Give each person enough time to finish what they have to say.
- Let others know if you can't hear or see important information.
- Ask someone to clarify what you don't understand.
- Encourage those who are quiet to contribute.
- When online...If someone has their hand raised for a while, speak up and let the facilitator know. The facilitator may not see everyone.

When talking...

- Keep your comments concise so that others have a chance to contribute.
- Share examples or experiences to illustrate what you mean.
- Acknowledge and respect different opinions or experiences.
- Respect everyone's emotions and day to day life challenges.
- Talk to each other as equals.

When presenting research...

- Share your goals for the meeting.
- Be sensitive to advisory board members' goals, which may be different.
- Adjust your goals to fit member's experiences and understanding.
- *Briefly* explain important terms in *everyday language*.
- Avoid "lecturing" for more than 15 min; be concise and don't "carry on."
- Facilitate informal discussion to seek input.
- Check in with members every 5 minutes for questions or comments.
- Seek constructive criticism.
- Wrap up in the last 5 min; summarize what you learned, how you will use the input, and how you will follow up.

FOR FACILITATORS

In general...

- Familiarize yourself with the Facilitation Tips (see Facilitation Guides and Agendas on our Resource page at <https://www.cje.net/research-education/bureau-sages/resources>).
- Ask those who talk most to wrap up and those who talk least to add to the discussion.
- Respectfully guide researchers to a balanced conversation and mutual exchange.
- Briefly validate issues that are less relevant and guide members back to the discussion at hand.
- If there is an important “outside” issue impacting members (such as a major organizational change or personal loss), find a creative way to briefly validate the experience and return to the purpose of the meeting.

When facilitating online...

- Identify technology needs and test all technology ahead of time (see checklist on next page)
- Make sure you are seeing all participants on screen at once. If that isn't possible, ask participants to help you notice when someone wants to speak.
- Ask everyone if they can see, hear, and/or read what's on the screen when the meeting starts and periodically throughout.
- Notice when participants are raising their hand, virtually or physically, and who is on mute or not. Ask participants to help you notice when someone wants to speak.
- Know how to assist members with muting and unmuting (e.g., to control background noise).
- Be calm and patient when there are technological challenges.
- Work around technology problems without taking too much time from the meeting.

ONLINE MEETING CHECKLIST

Suggested Equipment...

- ✓ Computer, iPad or lap top(s)
- ✓ Projection equipment
- ✓ Wireless microphones for facilitator and members, with extra batteries
- ✓ Speakers that enable all members to hear
- ✓ Camera that allows researchers to see all members
- ✓ Online meeting software that is easy to use

Guest Presenter, Researcher and/or Academic Partner Role...

- ✓ Email an online meeting invitation, a biosketch and presentation materials to on-site facilitator (a week ahead)
- ✓ Provide clear instructions for how to log in and use the meeting software
- ✓ Designate one other person to function as an online facilitator, so the researcher can focus on listening and responding to members

On-Site Facilitator Role...

- ✓ Accept the online meeting invitation and review any instructions
- ✓ Prepare/test computers, projectors, microphones, speakers, cameras, etc.
- ✓ Log in to online meeting software; test volume and visuals
- ✓ Set the online meeting software so that the speaker will appear in a larger frame
- ✓ Be prepared to help the researcher facilitate discussion

Online Facilitator Role...

- ✓ Log in early to coordinate with the on-site facilitator
- ✓ Troubleshoot any technical difficulties
- ✓ Use the chat or other communication feature to communicate behind the scenes with the researcher, if needed, to avoid distracting the group