

Inclusive Facilitation Playbook





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The purpose of this playbook is to help facilitators to remove obstacles that prevent people from contributing during workshops, training, or meetings. Attendees of live training courses or workshops enter into an environment created by the facilitator. This environment will be more or less favourable to each individual, depending on factors including but not limited to:

- Privilege
- Equity
- Accessibility
- Awareness

In a workshop, this means that only a proportion of attendees actively engage, asking questions, challenging the ideas presented, and contributing their own ideas. Think of the last event you attended, either as a facilitator or participant. There were probably a few people that developed a habit of regularly chipping in, and others who didn't speak at all.



As facilitators, we have sometimes indulged in the view that we're providing professional training, and attendees need to take responsibility for their own outcomes. However, this is missing a trick. By making the workshop environment more equitable and putting systems in place to help identify and remove forms of exclusion, everyone benefits:

- Active attendees get to hear a wider range of ideas
- Less active attendees will connect more with the topic
- Facilitators will lead more interesting workshops

Principles of Inclusive Facilitation

Inclusivity is for everyone

This sounds like an obvious statement, but Inclusivity can sometimes be viewed as a niche topic relating only to protected characteristics such as gender; LBGTQ+; race; disability; etc. It would be difficult to create a playbook that provided a comprehensive solution to everything, and even more difficult for a facilitator to put it all into practice. Given that everyone is unique, such checklists would fail because making a workshop accessible for one person would not necessarily make it accessible for the next person, even if they have similar needs. So this playbook will establish the mindset that every individual has a unique set of characteristics that may be well or poorly suited to an event you are facilitating. We establish the role of the facilitator as being accountable for removing forms of exclusion and barriers. Doing this means playing a more active role before, during, and after an event; developing awareness and skills to respond to specific needs.



Nothing about us without us

This phrase, borrowed from the disability rights movement, articulates the need to involve the people participating in an event in planning any accommodations. This is a powerful principle with applications beyond disability. Most people can recall a frustrating scenario where someone announced, *"We knew that you were coming and have decided to put this in place for you"*. Well-meaning event organisers might make assumptions, presumptions or stereotypes about what will be needed, only for these measures to miss the mark or even exacerbate problems. The solution to this is simple: **ask**, with open-ended questions. Build in the opportunity to ask the right questions of each group, with enough time to respond effectively.

Effective event design

While this playbook doesn't attempt to be a comprehensive manual for every inclusivity or accessibility adaption; there are some well-established patterns of good practice that can be built in to all events. We will suggest a top-five set of adaptations that you can apply to each stage in the delegate journey:

- Before the event
- Facilitating the live event
- After the event

Before the Event

Before the event is the time to identify the outcome you're driving for, and design the experience to create the best opportunity to reach that outcome. A clear outcome is a good foundation—for example:

- Making a plan for the week
- Getting aligned on a new initiative
- Teaching a topic or syllabus

With this objective in mind, an agenda and schedule can be created. Maximising the outcomes of the event can be achieved through good general design principles, combined with the opportunity to identify and implement specific accommodations.

Top Four Inclusive Workshop Design Principles

- 1. Accessibility – Remove obstacles that prevent people joining and staying.** Online tools such as video conferencing and interactive whiteboards should all meet accessibility standards. In person locations should have physical access for all, be reachable, and meet a range of dietary needs.
- 2. Knowing what to expect – Remove obstacles that may make people less willing to attend.** Sending out an agenda at least one week in advance will give people a chance to plan ahead. Make it open to all attendees to allow them the chance to decide if they want to attend and how they'll contribute if they do.
- 3. Group Size – Remove obstacles that make people feel lost in the crowd.** The more people in the meeting, the harder it is for everyone to have their say, so consider small groups (4-8 people) where possible, using breakout rooms (physical or virtual) if needed.
- 4. Delivery styles and pacing – Remove obstacles that make people disengage.** Design an agenda where people are not likely to get bored if something goes on for too long. Anticipate that people have different preferred learning styles. Switch between presentation, activity, breakout discussion, and other modes every 10-15 minutes. Take breaks every hour.



Nothing about us without us - The principles above establish a baseline of general good workshop design, especially for regular events such as training courses or planning sessions. A facilitator may systematically improve their chances of including a wider proportion of each specific group by asking **golden questions** in the runup to each session, especially if it is with a new group of people. This allows the group to collaborate on how a workshop should be run.

- How can this event be adapted to be accessible to you
- What immovable responsibilities do you have that we should be aware of? How best can we accommodate this for you?

- What can we do to help you make the most of this session?
- What would stop you from being fully involved?
- What support will you need to have the best experience?

Select or adapt these questions based on your knowledge of the group and context – eg a regular team meeting vs a public training course.

Facilitating the Event

While facilitating a live event, the role of the leader is to create a healthy environment by establishing working agreements; and to respond to attendees as the event unfolds. Help attendees to understand the intentions of the event and its objectives, and establish yourself as a facilitator providing a service that can be adapted to their needs.

Top Four Inclusive Live Facilitation Principles

1. **Working Agreements – Remove obstacles to establishing a productive environment.** Spending a little time at the start to invite the group to say how they want to participate can pay dividends for the rest of the event. As a facilitator you can keep an open mind while nudging on common issues. For example, in a virtual session you might say “people tend get more out of these classes when webcams are on”, without making it mandatory. If necessary you can remind the class of these agreements if things slip.
2. **Adapt to the group – Remove obstacles created by generic facilitation plans.** If a group is not responding well to an event, keep the objective of the session in mind and ask yourself how you might change things to help this group reach their objective. Be prepared to involve the group by describing what you think is happening, suggesting a way forward, and inviting suggestions. Calling out a problem often strengthens the groups perception that you are comfortable leading the event, which in turn helps attendees feel comfortable continuing to participate.
3. **Don't tolerate inappropriate behaviour – Remove obstacles arising from behaviour that excludes others.** As an event leader you are accountable for swiftly dealing with any behaviour that falls below modern professional conduct.
4. **Check in with people – Find out if any obstacles remain.** If you notice that someone isn't joining in, find an opportunity to check whether there is anything preventing them from doing so.



After the Event

If there are actions or outcomes to be fulfilled after the event, remove obstacles in this part of the journey that might cause people to drop out or have a poor experience. As with running the event itself, this will be a combination of good event design, and responding to what happened in each specific event.

After the event is also an opportunity to seek feedback that can improve future events. Creating an active and deliberate feedback loop is important to increase the experience and intuition of a facilitator. Your experience of an event will differ from others, and if you don't get an attendee perspective, you will miss out on feedback that will enable you to improve. Feedback will also enable all of the elements of event design to be adapted.

Top Four Inclusive Post-Event Inclusion Principles

- 1. Clear, accessible information on next steps – Remove obstacles to between attendees and the knowledge they need.** Send out clear instructions shortly after the event via a verified communications channel. If an event involves trying out a technique learned or taking an assessment, make sure there is useful follow-up information in a format everyone can use, as well as access to personal support if people have questions.
- 2. Ensure next steps are accessible – Remove blockers to actions or assessments.** If attendees need to sit an exam or complete an activity, provide information on adaptations available such as language, extra time provision, or accessibility.
- 3. Provide reminders – Remove blockers arising from inaction.** A quick reminder in the days or weeks after the event can nudge people into doing what they need to do, especially if there is a time limit on an assessment.
- 4. Seek feedback – Remove blockers in this event from affecting future events.** Ask for feedback in a simple way that enables attendees to flag up anything that wasn't right. Make sure that feedback is actively reviewed and actioned.



Appendix A: Forms of exclusion to consider

In-Person Issues

- Physical access
- Food and beverage
- Toilets
- Mixed mode - face to face with some online
- Using devices to take notes when instructor asks for devices to be put away

Online Technology Issues

- Tools such as Zoom with subtitles
- Ability to use Miro or Mural
- Accessibility
- Device type; screen size; number of screens; camera and audio equipment available to attendee
- Bad internet

Communication Style

- Language used
- Pronouns
- Presenters talking relentlessly / not allowing interjections or questions
- Introvert v Extrovert
- Preference for not sharing their image or their background via webcam
- Being "forced" to participate
- Different preferred learning styles: visual, text, lecture, exercises
- Not being listened to
- English not first language

Content

- Exercises being poorly explained leaving people unsure what to do
- Image diversity
- Avoid clichéd images of diversity such as black-and-white hands holding together or multicoloured puzzle pieces

Attendee Context

- Limited Knowledge compared to others in the group
- People might have other things to do that they couldn't get out of
- Relevance of topic to attendees role or interests
- Being "sent on a course" they see as a waste of time
- Home schooling / kids in background

Appendix B: Observations to look out for

Observed Behaviours

- Defensiveness
- Dismissive
- Discrimination, bullying, exclusion, harassment, victimisation
- Looking elsewhere during the call
- Dropping in and out of calls
- Being late after breaks
- sounding distracted
- looking distracted... eyes moving
- Not turning camera on
- Not offering any suggestions or participating in discussion
- Not talking or responding to group questions

Appendix C: Facilitator interventions

Content design

- Make forms accessible ([try The A11y Project](#))
- Pick accessible tools
- Use icons that don't all look male, etc ([try The Noun Project](#))
- Diversity of images ([try The Noun Project](#))

Pre-course preparation

- Give agenda and times before session
- Survey before the class starts
- Make the pre-reading as simple as possible
 - Simple call to actions
 - Highlight it
 - Drip feed

Introductions and establishing ways of contributing

- Team Charters
- Checklist at the start: Breaks, cameras, agreements etc
- "My preference as a trainer would be to see people"
 - But I understand that its not for everyone
 - How about cameras on just in the breakout group?
- Get people to rate themselves (without having to share)
 - How engaged do you intend to be in this session (scale of 1-10)

- If you're committing to be present, open give yourself a 10
- If you're going to respond to emails, slack, give yourself a 0
- How much risk do you want to take on while learning (Comfort to Stretch)
- How much are you prepared to commit to learning and supporting others
- "What is your internal level today?"
- Ask if there's anything we need to be aware of (other meetings etc)
- Ask people to opt in

Pro-active interventions

- Ask what can we do to make this an inclusive experience
 - Pre-course form
 - Live in session
- Enquire before a session to understand desired outcomes and possible differences among the group

Delivering sessions and responding to attendees interactions

- Call out deviations from agreements made at the start
 - Use judgement to decide whether to call out in front of the group, or contact people privately
- Work with the team to decide how groups should be managed
 - Keep teams the same to avoid repeated awkward team formation
 - Reform the teams to allow people to network or share ideas
- Check in with the person via private chat – ask if there's anything you can do to help them participate
- Facilitate round the table feedback at the end of sessions, such as after lunch or end of day, especially for longer sessions where there is the potential to enact feedback for the remaining time
- Use facilitation techniques designed to draw out contributions from a wide range of participants. [Liberating Structures](#) are a great place to start.