



CANADIAN CENTRE FOR ELDER LAW

Making Investment Decisions with Support: Rights and Strategies Facilitator's Checklist

■ Before the presentation

- **When creating your event:** consider capping the number of participants. You will need one facilitator per breakout group. For example, if you have 20 registrants (5 to a breakout group), 4 facilitators is ideal.
- **Upon registration:**
 - Let registered participants know ahead of time if they need to bring signs/items of their choice as communication aids.
 - Inquire about mobility needs to attend an in-person presentation.

■ During the presentation

- **Consider using communication aids during the presentation and activities.** This helps people who may be non-verbal to communicate their understanding/familiarity with concepts/ideas.
Ex: green ("GO"), yellow ("PAUSE"), and red ("STOP") cards or objects for participants to hold up when prompted.
- **Establish an inclusive space.** Remind participants often that they should only share what they are comfortable sharing. If any activity or question makes them uncomfortable, they are free to skip it. Set out a process for sharing concerns about the presentation.
- **Encourage people to leave their cameras on** during the presentation but do not enforce it as a rule.
- **Implement short breaks** throughout the presentation (prompts for breaks are included in the presenter's notes).



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☐ For online presentations

- Use all the tools at your disposal:
 - **Chat box:** Account for people who may not communicate with traditional means (people who are non-verbal, deaf people if ASL interpretation is not available, etc.). Use the chat box as a tool for introductions and breakout activities.
 - **Whiteboards:** Some platforms have communal visual boards that are great to add images, draw on, add notes, etc.
 - **Live polls:** You may want to use live polls to foster engagement.
 - **ASL or closed captioning:** If budget allows, consider ASL interpretation or closed captioning (CC). Automated CC programs are fairly cost-effective.

☐ For in-person presentations

- **Have a few reading glasses/magnifying glasses** for people with visual support needs.
- **Scan the room for the following:**
 - Make sure to use open or round tables, with a mix of chairs;
 - Consider the placement of tables to avoid distractions and physical obstructions;
 - Ensure the space is large enough for participants with mobility devices;
 - Consider the lighting—is it bright enough?

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☐ For in-person presentations (continued)

- **Indicate clearly where people can find:**

- the washrooms;
- the waiting room; and
- the refreshments.

Remind people that that they are free to leave the room or move about, as they wish, throughout the presentation (in person and online).

CCEL encourages you to adapt this presentation and checklist. We would love to know if you are using our resource. Email us to let us know at kjames@bcli.org

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For more information, visit www.bcli.org/ccel