

Considerations for Inclusive Convenings

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This document is meant to be a resource for those seeking to plan more inclusive convenings, particularly larger gatherings of more than 75 people. However, smaller meetings may also benefit from some of these considerations. While formatted as a checklist, we recognize that creating an inclusive space requires more than “ticking a box.” Nevertheless, we hope it provides some valuable insights as you plan your meeting.

This document is a work in progress, and we invite you to share any comments and suggestions with Danielle Levoit, Program Officer for the Environment at the Doris Duke Charitable Foundation (dlevoit@ddcf.org), so we may continue to update it. Individuals and existing resources that have contributed to the document can be found at the end.

Meeting date, timing, and location

- ☐ Try to avoid religious and other holidays when determining your meeting date.
- ☐ Meeting timing should take into consideration audience schedules and needs. For example, when targeting educators try to schedule meetings during the summer or in the middle of the semester on weekends.
- ☐ Consider whether the meeting location is geographically accessible for participants.
- ☐ Consider the length of the meeting and how much work early-career participants might need to miss as they are less likely to be able to secure paid time off or attend meetings without perceived penalty from their employer.

Pre-conference identification of needs

- ☐ Participants and speakers should be asked to provide information on the following accommodation needs. These questions could be asked in the registration form or over email, although the option of discussing accessibility needs over the phone should also be provided. Meeting planners should ask these questions far enough in advance to be able to accommodate participant or speaker needs.
 - ☐ Dietary requirements or preferences
 - ☐ Wheelchair access
 - ☐ Physical space adaptation, please specify _____
 - ☐ Prayer/meditation/quiet space
 - ☐ Smoke-free and/or scent-free environment
 - ☐ Gender neutral bathroom facilities

- ☐ Lactation room and refrigeration
- ☐ Service animal
- ☐ CART (Communication Access Real-time Translation) services
- ☐ ASL (American Sign Language) interpreter
- ☐ NSL (Native Sign Language) interpreter
- ☐ Braille print conference publications
- ☐ Large-print conference publications
- ☐ Other, please specify
- ☐ Be clear on what accessibility accommodations will be provided so participants can request or arrange additional accommodations that have not already been covered, rather than putting the burden on them.
- ☐ Communicate the venue for the meeting as early as possible to allow participants to evaluate any accommodations they may need
- ☐ Communicate the agenda/schedule at least two weeks in advance so participants can communicate any accommodations they will need (e.g., long conference days or hackathon style events may not be possible for those with certain health needs).
- ☐ When asking for a person's name during registration, be clear about how a person's name may be used and when it will appear. For instance, a person may need to provide their legal name for flights or getting into a venue but may wish to have a different name on their name badge.
- ☐ Ask for people's pronouns for them to be printed on their badge (with an opt-out option for people who may be uncomfortable sharing that information)
- ☐ Send out a reminder a few days before the conference with information on accessible entrances, elevators, or other services, and repeat instructions for how to request accommodations on-site.

Meeting venue

- ☐ The following meeting venue considerations should encompass registration area, main meeting rooms, breakout sessions, eating areas, networking/socializing areas, and off-site locations (e.g., restaurants, tours).
- ☐ Ensure meeting venue is accessible to people with physical impairments (venue has elevator access and elevator is operational, accessible entrances, activated automatic door openers, smooth surfaces, ramps, and clear, legible signs). For a full list of building requirements, please refer to the [Accessible Meetings Toolkit](#) from the American Bar Association.
- ☐ Provide significant detail to participants on wheelchair accessibility (i.e., saying "wheelchair accessible" may not be enough because wheelchairs come in different shapes and sizes.)

- ❑ Consider whether the main conference area and breakout session rooms are on an accessible path of travel and are easy to find/navigate for attendees with disabilities. Ensure there are working elevators and/or ramps to all areas of the venue where there are sessions.
- ❑ Consider the size of the venue required: estimate the number of potential attendees and be liberal in assessing space required to comfortably accommodate the movement of persons using wheelchairs, scooters, and other mobility devices, persons with visual impairments, persons with assistance dogs, and other attendees. (Too small a space creates “bunching” and segregation of wheelchairs etc. near entrances, and limited movement, discomfort, and potential trip hazards for all attendees.)
- ❑ Ensure that all tables, products, displays, and information are arranged at a height that can be accessed by most everyone comfortably, including those using wheelchairs or scooters.
- ❑ Ensure there are sufficient spaces available without chairs, for use by wheelchairs and scooters, but avoid designating a single area as “for wheelchair use” as this segregates individuals using wheelchairs from being seated with friends and colleagues. Instead, disperse wheelchair accessible spaces throughout the event.
- ❑ Ensure the pathways to displays, stages, speakers’ podium, etc. are wide enough for wheelchairs, scooters, and other mobility aids, and are free from trip hazards.
- ❑ Ensure the stage or speakers’ podium itself is accessible, including for persons using wheelchairs, scooters, and other mobility aids.
- ❑ Provide seats near the front of the room for individuals who have a hearing or vision impairment to provide clear access to sign language interpreters, and so people can more easily lip read, or better hear speakers/sound enhancing devices, etc.
- ❑ Ensure washrooms, telephones, and any other conveniences are accessible for all persons, that there is clear, easily visible signage indicating their location, and that the pathway to conveniences are sufficiently wide and clear of impediments and trip hazards.
- ❑ If the event is being held at an outdoor site, ensure that the surface is accessible for persons using wheelchairs and scooters. Ensure that trails or paths are marked at their entrances with information about accessibility throughout the trail (e.g. identify the presence at some point on the trail of steps, interruptions of the accessible surface, steep slopes, etc.) Ensure there are areas providing protection from exposure (sun, rain, wind).

- ☐ Ensure there is access to a private room that is appropriate for use as a lactation room. Refrigeration is also provided.
- ☐ Consider access to a private room for use as prayer, meditation, or quiet space.
- ☐ Have designated smoking areas with adequate space away to not impede non-smoking participants.
- ☐ Consider a venue that has gender neutral bathrooms in a location close to the event or is open to designating specific bathrooms as gender neutral. If this option is not available, remind your attendees not to challenge somebody else's choice of bathroom.
- ☐ Ensure that accessible restrooms are available.
- ☐ Ensure that any emergency evacuation procedures consider the needs of people with mobility and sensory impairments.
- ☐ Consider a venue that aligns with the goals and values of your meeting (e.g., LEED certified, gender neutral bathrooms, supporting the local economy, etc.).
- ☐ Confirm with the venue any rules around service animals and communicate the presence of service animals in advance if known to avoid the venue staff confronting attendees with service animals.
- ☐ Ensure there is a nearby place for service animals to relieve themselves and provide clear signage for participants with service animals.

Food/beverages

- ☐ Request dietary restrictions/preferences in advance (noted above).
- ☐ Accommodate dietary restrictions/preferences to the best of your ability/hire caterers who can meet those preferences (e.g., peanut, gluten, shell fish, lactose allergies, vegan, vegetarian, Halal, or Kosher preferences).
- ☐ Vegetarian, vegan, and dairy-free options are included for all meals.
- ☐ Any buffet-style meals are clearly labeled with offending components placed out of reach to avoid accidental cross-contamination.
- ☐ Consider providing to-go containers for participants (e.g., if the meeting is taking place during a holiday where daytime fasting is observed).
- ☐ Water is easily accessible during the event.
- ☐ Provide non-alcoholic beverage options at receptions or other social events during the meeting and inform participants ahead of time that these options are available.
- ☐ Consider hiring a caterer who aligns with the goals or values of your meeting (e.g., local/small business caterer, minority-owned business, locally sourced, pays a living wage, etc.)

- ❑ Incorporate best practices for planning a zero-waste event (recycling, composting, excluding the use of plastics, providing reusable containers, minimizing the use of plastic straws).
- ❑ Consider partnering with a food recovery bank or homeless shelter for safe and immediate transfer of food products (food safety best practice is within 2 hours or service).
- ❑ Let participants know which meals will be covered or provided at the meeting and what dietary options will be available.

Transportation

- ❑ Provide clear text and image instructions on how to get to the conference venue and other relevant conference locations (e.g., if participants will be staying at a designated hotel). Make sure these instructions are print-friendly and not just a link to a Google Map.
- ❑ Know in advance whether any participants have mobility needs and will require alternative transportation arrangements.
- ❑ Provide clear signage at appropriate locations, such as nearby transit points and parking areas.
- ❑ Avoid using signage in a manner that blocks sidewalks or creates a trip hazard.
- ❑ Ensure that the route between parking/transit, and the event location and entranceway, is accessible.
- ❑ Ensure there is sufficient accessible parking. Or ask the venue to temporarily designate extra accessible parking spots (with signs, etc.).
- ❑ Consider accessibility to public transit.
- ❑ Consider arranging accessible shuttles between the venue and hotel if accessible public transit or other alternatives (e.g., wheelchair accessible taxis) are not available.
- ❑ Ensure there is adequate lighting, including in parking areas and at routes to transit links.
- ❑ Check for local events, construction, or weather warnings that may impact attendee travel. Communicate these to your participants to help them navigate any issues.

Hotel

- ❑ Hotel is accessible to people with physical or other impairments.
- ❑ Communicate with hotel about any service animals accompanying participants to avoid hotel challenging participants with service animals.
- ❑ Consider partnering with unionized hotels.

Meeting agenda/program

- ❑ The meeting organizing committee includes representation across a number of different dimensions (e.g., race/ethnic, gender, ability, sexual orientation, geographic, sector, and/or political identities or perspectives, etc.)
- ❑ When applicable, participants have had an opportunity(ies) to provide feedback on the meeting agenda before the meeting. Enough time has been provided to offer feedback and multiple avenues for sharing that feedback are available.
- ❑ Incorporate participant input into program choices (e.g. through conference, session proposals).
- ❑ The agenda includes breaks at least 2.5 to 3 hours to accommodate meals, prayer, health/stretching and nutrition breaks (more often if possible).
- ❑ Review Honor Native Land Guide (<https://usdac.us/nativeland/>) and determine how to authentically honor native land and place and indigenous people throughout the meeting. Consider asking for permission to use the space from indigenous leaders.
- ❑ Acknowledge and showcase multiple ways of knowing throughout the meeting.
- ❑ If the meeting occurs in multiple rooms or locations ensure that there is ample time for participants with different mobility needs to move from place to place while still allowing time for a break for all participants.

Participants/speakers

- ❑ Participants and speakers – in particular keynote speakers – reflect representation across a number of different dimensions (e.g., race/ethnic, gender, ability, sexual orientation, geographic, sector, and/or political identities or perspectives, etc.)
- ❑ Consider the outreach and partners necessary to ensure broad representation across speakers and participants.
- ❑ Offer visa invitation letters for people coming from overseas. Offer a contact person for questions from international participants if possible.
- ❑ Consider offering non-native speakers of the meeting language a mentor to help them translate or communicate in the meeting language.
- ❑ Consider offering a first-time speaker or less experienced speaker a mentor who can help them practice or give guidance.
- ❑ Offer speakers multiple ways of presenting their information (PowerPoint, storytelling, visual representation, interactive, etc.) and ask what room set up or supplies are most conducive to their style of presenting if possible.

Meeting atmosphere

- ❑ Consider facilitators who can create inclusive meeting environments and who can support active engagement across the broadest range of participants.
- ❑ When applicable, establish working agreements in partnership with participants.
- ❑ Develop a code of conduct for the meeting. The code of conduct should be shared through multiple avenues before and during the event with participants, speakers, and meeting organizers. An enforcement and reporting process should also be decided in advance. Require all participants (including any vendors or exhibitors) to read and agree to abide by the code of conduct before attending the meeting.
- ❑ Social media guidelines are developed before the meeting and communicated to participants and speakers before and during the event.
- ❑ Participants are asked to communicate their preferred pronoun (he, she, they, etc.) on their conference badge (or during the registration process); consider using pronoun ribbons. Also provide the opportunity for a person to opt-out if they are uncomfortable sharing that information.)
- ❑ Avoid gendered language (“ladies and gentleman”) during the meeting.
- ❑ Ushers, seaters, volunteers, etc. are informed and aware of accessibility features of the event, and the commitment to accessibility generally. They have contact information in the event of an accessibility problem during the event.
- ❑ Determine whether additional on-site assistance for attendees with disabilities is necessary (e.g., someone may need help carrying bags to different sessions or navigating the space).
- ❑ Consider providing childcare. If providing childcare is not possible, provide a list of local child care options. Consider offering full or partial reimbursement for childcare as part of scholarships. Be explicit about whether children are welcome at the meeting and in which settings and what kind of food may be available for them.
- ❑ Consider sharing information on the nearby community and its history in advance of the meeting.
- ❑ Support affinity spaces at your meeting. Let participants know the process for how they may formally or informally create an affinity space or mini-gathering at the meeting.
- ❑ Be explicit about the dress code for the event (even if there isn’t one) and communicate it to participants prior to the meeting.
- ❑ Make sure meeting organizers are visible. If there is a registration desk, try to have someone there at all times to help participants.

- ❑ Try to make first-time meeting attendees feel welcome, by encouraging attendees to follow the [Community++ rule](#) and the [Pac-Man rule](#). Other ideas could include having a special welcome gathering for first-time attendees.
- ❑ Notify attendees if photographs will be taken or recordings or videos made. Allow them an opportunity to opt out and provide a way for the photographer/videographer to identify those who have opted out (e.g., different color name tag lanyard).
- ❑ Consider offering multiple types of sessions to encourage and welcome other methods of communication (interactive sessions, discussion sessions, presentations in other mediums such as dance or music).
- ❑ Consider asking participants to “raise their hand” instead of standing for acknowledgement to include those who are unable to stand or have difficulty standing.

Accessible content

- ❑ Conference website is accessible (e.g., screen reader accessible, large font size, color contrast, alternative text for images, easily navigable, etc.)
- ❑ If using an online invitation/RSVP system, consider changing the time allotted to RSVP (before timing out) from the default to at least one hour.
- ❑ Make materials for the event available in alternate formats, such as an electronic version as well as hard copy, large print, and/or Braille, and provide copies in advance of event so people have time to review materials.
- ❑ Ensure signage or materials are high-contrast and large-print for attendees with low-vision. Consider Braille signage or materials when appropriate.
- ❑ Information is provided in advance about how to make requests for modifications or auxiliary aids and the accessibility of the meeting (e.g., interpreters, translators, real time captioning, hearing loop, etc.). Provide all media in alternative formats: transcripts (or detailed notes) for video-recorded material, and closed captioning if possible.
- ❑ If film or video materials are being used on the website to advertise the event, ideally they should be captioned (potentially in multiple languages).
- ❑ A microphone is used for all presenters, and for all Q&A sessions (for both speakers and those asking questions).
- ❑ Consider providing real-time captioning of talks or a hearing loop, which makes it easier to follow for people who are deaf or hard-of-hearing.
- ❑ Offer appropriate sign language interpretation or translation services during talks if a participant has indicated this requirement (e.g., American Sign Language interpretation or Native Sign Language interpretation)

- ❑ Consider audio descriptions for any video segments or visual displays during the meeting for blind participants. Consider how to involve online participants in any interactive parts of the meeting (specifically calling for any feedback from online participants, a chat box that is monitored by an on-site participant, etc.)
- ❑ Consider allowing for remote participation by streaming the event online.
- ❑ Make materials (video recordings, slides, notes) freely available online to view after the event, especially if live streaming is not possible.
- ❑ At least 3 weeks before the event, encourage speakers to review guidelines on designing easy-to-read slides: <https://www.w3.org/WAI/training/accessible>
- ❑ Consider pre-screening all visual materials (print, online, pptx, film...) for access to those with color-blindness
- ❑ Consider also providing information to speakers on appropriate terminology (e.g., “person with a disability” instead of “handicapped person”) and etiquette to ensure their sessions are inclusive.
- ❑ If applicable, publish a glossary of conference terms if there are traditions or jokes that often are repeated during the conferences or technical jargon/abbreviations that may not be known by all participants.
- ❑ Ensure training is provided to all conference staff that will be helping with assistive technology.

Site or field visits

- ❑ The range of activities provided are accessible to all fitness levels, including persons with physical disabilities and different athletic and activity levels.
- ❑ Visits allow meeting participants to engage with and experience the community in a meaningful and non-transactional way.
- ❑ Consider offering service-learning opportunities with local community partners that fit the values of the organization (invasive species removal, species identification and labeling at a local park, youth outreach, or education event).

Funding/budgets

- ❑ Consider accessibility costs as you develop the event budget.
- ❑ If applicable or feasible, try to limit economic barriers to attending meetings (e.g., if travel is being covered, asking participants to pay large cost items, like flights, up front may be a barrier even if reimbursements will be offered after the meeting).
- ❑ Consider tiered or sliding scale tickets which are dependent upon a person’s ability to pay. Provide an option for people to cover the cost or a portion of the cost of an additional registration to support those who may not be able to pay the

full price or a way for them to donate a ticket to a special event if they end up not being able to attend.

- ❑ Consider offering scholarships or offering to pay in full for travel, meeting registration, and/or lodging. Allocation is prioritized for groups that face the most barriers for self-funding.
- ❑ Where partial scholarship funding is provided, make and communicate decisions as quickly as possible, so that recipients can take advantage of lower travel prices. If there is early bird registration pricing be sure to communicate scholarship offers before registration prices increase.
- ❑ Consider if or how you might meaningfully compensate speakers or attendees for their time, beyond supporting their registration, travel, and lodging costs.
- ❑ Sponsorships or funding specifically for accessibility-related conference needs may be appealing to some funders.

Post-meeting

- ❑ Post-meeting surveys ask a question(s) about whether the meeting process/environment was inclusive and met accessibility needs.

Resources used:

Ideas for Inclusive Conferences and Events:

<https://alexwlchan.net/ideas-for-inclusive-events/long-version/#long-version>

The Less Obvious Conference Checklist:

<https://github.com/mxsasha/lessobviouschecklist>

Checklist for Accessible Event Planning:

<https://equity.ok.ubc.ca/resources/checklist-for-accessible-event-planning/>

Conference Planning Checklist:

<https://sparcopen.github.io/opencon-dei-report/checklist.html>

Plan a Meaningful Gathering: https://ssir.org/articles/entry/plan_a_meaningful_gathering

How we Organize the Allied Media Conference:

<https://www.alliedmedia.org/amc/how-we-organize>

Planning Accessible Meetings and Events: A Toolkit:

https://www.americanbar.org/content/dam/aba/administrative/mental_physical_disability/Accessible_Meetings_Toolkit.authcheckdam.pdf

World Institute on Disability Conference Accessibility Checklist:

<https://worldinstituteondisabilityblog.files.wordpress.com/2016/01/wid-conference-accessibility-checklist.pdf>

The Chicago Community Trust:

<https://cct.org/2017/06/making-your-events-truly-accessible-and-inclusive/>

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