



# Tips and Tricks for Inclusive Virtual Meeting Planning

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## Intro

We have all heard the saying “Know your audience!” What often is unnoticed is the essential preparation required for a diverse audience. With that preparation, you ensure everyone feels welcome, can access the content and can fully participate. Following the tips in this document will benefit your entire audience not just participants with disabilities. This document has been compiled by the Disability Inclusion Network (DIN) Business Resource Group ([DIN@ofm.wa.gov](mailto:DIN@ofm.wa.gov)).

## Preparation and Accommodation Requests

During the planning process, the high-level steps are:

- Plan for Meeting Announcements;
- Learn the Platform;
- Locate Accessibility Resources;
- Decide Meeting Details;
- Assign Meeting Roles;
- Establish Feedback Process.

### Plan for Meeting Announcements

All of your promotional material (aka meeting announcements) should include information on how to request accommodations for the meeting. Ensure someone will be monitoring for these requests. Send out the meeting announcements well in advance so you have plenty of time to handle requests. In your meeting announcements, include:

- List of planned accommodations;
- How to request other accommodations;
- Deadline for requests that allows enough time to handle the requests (the length needed depends on the type of event and accommodations);
- Link to join the meeting and call-in phone number (the call-in number is important because this supports participants with low bandwidth, captioning and video relay services).

### Learn the Platform

Become familiar with your virtual meeting platform’s accessibility features. The best way to learn your platform is to schedule practice meetings well before the actual meeting and include volunteers with disabilities. Several practice sessions may be needed so everyone knows how to configure and use the features. This will go a long way in ensuring the optimum meeting experience for all participants.

### Locate Accessibility Resources

Find resources for the type of accessibility you may need. The resources needed depends on your audience and the accommodation requests you receive. Some resources for Washington State agencies are listed in this section. To find other resources or get more detail, you should contact your Human Resources office, which either will have an Americans with Disabilities Act (ADA) specialist or be able to locate one.

### Sign Language Interpreters

If someone requests sign language interpreters, you can hire an interpreter to sign during the meeting using video.

- [State of Washington Sign Language Interpreter Services - Referral Agencies](#)
- [State of Washington Sign Language Interpreter Services – Independent Contractors](#)

### Captioning

Captioning includes people with hearing disabilities in your virtual meetings. Depending on the platform, you may have the capability for a person to enter live captions or enable automated captions.

- [State of Washington Communication Access Real-Time Transcription Providers](#)

### Documents in accessible and/or alternate formats

If you are sharing electronic documents or slide decks during your virtual meeting, you should make them accessible to attendees with disabilities. In addition, if you are promoting your meeting on social media, your posts should be accessible. Below are links to three guides for different mediums. (Please be aware that these links may not always be current.)

- [Creating Accessible Documents](#)
- [Creating Accessible Presentations in Microsoft PowerPoint](#)
- [Creating Accessible Social Media](#)

### Decide Meeting Details

As mentioned in the introduction, knowing your audience is an important part of virtual meeting planning. Deciding what you will do during your meeting is just as important. Below are some questions to aid in that process. After the details are decided, prepare your meeting checklist using the sample checklist in this document as a guide.

- What will the group size be? More planning is required for large groups.
- How long is the meeting? (Decide how many breaks to arrange.)
- What is the plan to handle audience participation?
  - How will you ensure everyone hears the questions asked?
  - How will you handle turn taking? (Some ideas are in the Meeting Roles section below.)
- Will the Chat window be used? How will the chat be handled to ensure that participants with visual disabilities are included? (There are some tips in the Meeting Roles section below.)
- Will there be virtual breakout rooms? If there are breakouts, figure out how to make more than one accessible. For example, if you have two Deaf participants and they want to go to different breakouts, each breakout will need an interpreter and/or a captioner.
- Will there be material shared during the meeting?
  - How far in advance should the material be distributed before the meeting?
  - How will that material be narrated for people with visual disabilities?
  - Will Deaf participants be comfortable viewing the interpreter and material simultaneously?
- What meeting activities are planned? Make sure all participants can fully participate in the activities. For example, avoid activities involving identification of sounds or music if you have participants with hearing disabilities.
- Are there speakers? Distribute the accessibility tips section and your checklist to the speakers.

### Assign Meeting Roles

The roles needed to support full inclusion will depend on your meeting details. This section lists possible roles that you may want to have along with tips for each.

## Host

The host manages features during the meeting. For example, to ensure the best audio experience, the host may decide to mute participants. The host may also need to turn off video for participants who do not depend on it to free up bandwidth for others. If the meeting is large, co-hosts may be needed to divide responsibilities. If co-hosts are used, they should be selected before the meeting to ensure seamless transitions.

## Moderator

The moderator typically is the facilitator for the meeting and announces the ground rules. If there are issues with accessibility, the moderator should pause or reschedule the meeting so that the issues are resolved. The moderator may read the chat aloud so all attendees are included. The moderator should also ensure that people using a sign language interpreter have time to participate in the meeting, considering the slight delay from translating spoken words.

## Chat Monitor

Depending on the size of a meeting, there may be need for a chat monitor separate from the moderator. The monitor should read the chat comments so that participants with low vision hear them. The monitor could also watch the captions to ensure accuracy.

## Networking Break Moderators

If your meeting will have networking breaks, this role would ensure the participants with disabilities can participate fully in each room. For example, if there are multiple deaf participants who elect to join different rooms, the moderator makes sure there is a sign language interpreter assigned to each of these rooms. If the breaks use the chat window, the moderator would read the comments aloud for participants with low vision disabilities.

## Note taker

This role takes notes during the meeting then distributes them afterwards. These notes are obviously very useful for every attendee but particularly so for these who may have missed content due to their disabilities.

## Technical Support

This would be a person familiar with the virtual platform and does not have other meeting responsibilities. The support person should troubleshoot problems during the meeting and follow up afterwards on unresolved issues. This is extremely important for accessibility features, which are not widely used.

## Establish Feedback Process

Decide how you will gather feedback from the participants. Ensure you get feedback on the meeting conduct and accessibility as well as the content. Conduct additional follow-ups with your participants with disabilities to confirm all of their needs were met.

## Meeting Conduct Tips

### Before the meeting

- Open the meeting 15-30 minutes early for all participants who need additional setup time.
- Ensure external services such as sign language interpreters and captioners join early to test their services before the meeting starts.

## Check-in at the start of the meeting

- Check your audio volume and speed.
- Request everyone mute their microphone and only unmute when they want to speak. Check on the audio quality for everyone.
- Check that video is working for everyone who needs it.
- Discuss a method of indicating a participant wants to say something.
- Check that all of your accessibility features (Interpreters, captions, etc.) are working properly.
- Make sure everyone has the documents needed.
- Review assignees with meeting roles (chat monitor, notetaker, etc.) so there are no surprises.

## During the Meeting

- Review ground rules so all participants have the same understanding.
- One person speaks at a time. This ensures that whoever is speaking can talk without interruption. It also helps those who may be reading live captions or watching a sign language interpreter, and will also provide a more accurate recording.
- Say your name before speaking. This will identify you to those who cannot determine who you are by the sound of your voice. Saying your name both ensures transition between speakers and ensures everyone knows who is talking.
- If you share your screen, always describe what is on the screen. Visual descriptions make sure those who cannot see the screen are included.
- Make sure the method of providing feedback is agreed upon by the group. Some common methods are audio cues, hand raising, and chat. There are pros and cons for each approach depending on your participants. If you do use the chat window, make sure the monitor reads the contents to the group.
- Have an agenda and stick to it. Refer to the agenda often so participants have a frame of reference. This also is important for presenters so they can prepare mentally and physically before it is their turn.
- Always retain a sense of humor! Be prepared to have issues and laugh about it. Technology trips us all up.

## Accessibility Tips

### Deaf and Hard-of-Hearing Access

- Are sign language interpreters needed? Is captioning needed? Will it be AI (automated voice to text) or CART (Communication Access Realtime Translation)? How will the caption quality be monitored?
- Be aware of background noise during the meeting and handle it by muting audio.
- Speakers faces should be well-lit to support lip reading.
- Plan to handle multiple video windows so that everyone using sign language has adequate window sizes. This is particularly important when meeting material is shared electronically on the screen. Your virtual platform should have features like pinning, spotlighting and hiding non-video participants that will help.

### Blind and Low-Vision Access

- Distribute meeting material well before the meeting for screen reader software.

- Ensure material uses accessible fonts and does not use flashing or strobing animation.
- Make sure any visual images are narrated during the meeting. Include these descriptions for images in the meeting material.
- Ensure speakers identify themselves when taking turns.
- If you are showing videos, search for an audio-described version on YouTube by searching for the name of the video with the words “audio described.” You can also search for the video on the website [youdescribe.org](https://youdescribe.org). If no audio-described version exists, that site has a browser extension you can use to describe it. Another option is to request that a volunteer describe it.
- Be aware that the screen reader, JAWS, makes it hard to use the chat because it creates a lot of chatter that prevents the individual from following the meeting.

### Physical Access

- Plan for breaks depending on your meeting length. People dealing with pain or limited mobility may have additional needs to stretch during the meeting.
- When breaks are planned, make sure to allow enough time for participants with mobility disabilities to use the restroom.
- Ensure the platform supports use of the keyboard instead of the mouse

### Mental Health Access

- Be aware of the language used. Use people-first language. For example: “He is living with bipolar disorder” instead of “He is bipolar.”
- Utilize breaks and time for those who might need to rest between topics during meetings.
- Refer to a person’s mental illness only when pertinent to the content.
- Do not use mental-health terms to describe situations. For example, don’t say “the agenda was crazy.”

### Cognitive Access

- Make sure to follow your agenda for a frame of reference.
- Concurrently using text as well as audio content can be helpful.
- Become familiar with the learning style of participants then use the appropriate communication methods during the meeting.
- Use plain language. Some tips can be found in [State of Washington Guidelines for Writing in Plain Talk](#).

# Sample Checklist

## General Preparation

- Select the platform and assign staff to become familiar with its accessibility features
- Identify your accessibility resources and allocate funding
- Set up process to accept accommodation requests from meeting participants
- Decide how far in advance to send out meeting advertising so accommodation requests can be fulfilled

## Specific Meeting Preparation

- Identify the meeting details and target audience
- Decide which accessibility options to include up-front
- Make sure all meeting advertising includes accessibility details, how to place accommodation requests and a call-in number
- Determine what meeting roles are needed for the specific meeting and assign staff
- Address all accessibility requests
- Inform all presenters of accessibility requirements for their presentation content
- Internally review agenda and content for accessibility including break times
- Send out agenda, ground rules and material to participants allowing time for their review

## During Meeting

- Open the meeting early to allow for setup time for accessibility features and anyone who needs extra time
- Ensure staff is present and aware of their responsibilities for their assigned meeting roles
- Conduct the check-in
- Review meeting ground rules
- Review the agenda then refer to it periodically during the meeting
- Pace the meeting so participants do not feel rushed
- Make sure any accessibility feedback or issues are addressed appropriately during the meeting
- Don't skip scheduled breaks

## Post-Meeting

- Assign staff to follow up on all feedback received during the meeting
- Provide a meeting summary, notes and transcript to participants
- Solicit additional feedback using surveys or other methods
- Conduct a review with presenters and other organizers to identify improvements for the next meeting