



Guide for facilitating inclusive virtual meetings

Why use inclusive facilitation for online meetings?

The Oregon Department of Human Services is operationalizing our Core Values of Respect and Service Equity through initiatives like [RISE](#). Building an inclusive organizational culture is challenging in normal times, but in the age of COVID-19 creating inclusive virtual spaces can seem especially daunting. Social distancing is requiring staff and community partners to use online meetings to get work done which often leads to feelings of human disconnection and a loss of productivity. Watch this [humorous video](#) that illustrates some of these challenges. It is imperative to our collective success that each person is able to be fully present and contribute their authentic selves in every meeting.

Beyond the technological challenges, research shows that for in-person meetings:

- ❑ In a four-person group, **two** people do 62 percent of the talking.
- ❑ In a six-person group, **three** people do 70 percent of the talking;
- ❑ In an eight-person group, **three** people do 70 percent of the talking.¹

Usually those individuals dominating the conversation do not realize their impact. They leave believing that the meeting went well, while their teammates feel excluded. Moreover, studies show that women, people of color, and other underrepresented groups are often silenced, interrupted, dismissed, or talked-over at twice the rate of their colleagues. This inequitable dynamic gets amplified on virtual meetings if meeting facilitators are not actively managing it.

When using online meeting technologies it is crucial to be organized and communicate clearly before the meeting, much more than if it were an in-person meeting. Interpersonal cues are more difficult to read in a video or phone call such as body language or tone of voice. Building teamwork, relationship, and a sense of community is challenging in these conditions.

Facilitators need to be mindful of ensuring that there is equity for all people to participate, whether they are in the room or online.

This guide offers tips for facilitators to help make your meetings more welcoming and productive for everyone - no matter *who* or *where* they are. We would love to hear your ideas for practices that build inclusive meetings to keep improving this guide for everyone.

¹ Leigh Thompson "How to neutralize a meeting tyrant" *Fortune* (2013)

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A word about facilitator preparedness

When discussing excellence in inclusive meeting practice, the facilitator doing their own work around cultural humility and self-awareness is of highest importance. We use the term “facilitator” in this guide to refer to the meeting organizer and/or the person that is responsible for setting the space for a group to have an open, productive, and inclusive meeting. A skilled facilitator continuously hones their knowledge and skills around their own implicit biases, communication style, intercultural conflict style, work preferences, motivations, triggers and hot buttons around diversity and equity issues. A skilled facilitator asks for honest feedback and seeks new learning opportunities. The facilitator sets the tone for the meeting and it is vital they continuously do deep self-exploration into their positionality, privilege, and impact on others.

Questions, comments, or suggestions?

Contact Jason Mak, Diversity and Inclusion Manager at jason.d.mak@dhsosha.state.or.us

PARTICIPANTS

Review your list of attendees: are you missing underserved communities or those that represent diverse or differing points of view?

- Subject matter experts (SME) that also have an [equity lens](#)?
- Diversity of stakeholders, staff, and/or community members across gender, race, ability, sexual orientation, gender identity, position, program, and other differences?
- Based on available data and historical patterns of inequities are the people, families, and [communities disproportionately impacted](#) included?
- [Tribal partners](#)?
- [Employee Resource Group](#) representatives?
- Local [Equity and Inclusion Committee \(EIC\)](#) members?
- [DHS Tribal Relations](#) or [Office of Equity and Multicultural Services \(OEMS\)](#) staff?

MEETING INVITATION

What is the most welcoming way to invite participants?

- Are there elders, management, staff, community, or honored guests that need to be consulted or contacted prior to sending an invitation and agenda?
- If community members are invited how have you ensured that barriers such as internet access, technology, and other considerations have been addressed appropriately? If they are appearing in-person, have we offered to pay for travel costs or address childcare needs?
- Does the meeting date or time conflict with a religious, cultural, holiday, or other important observance or event? (See <https://www.diversitybestpractices.com/diversity-holidays>) If it is unavoidable, did you acknowledge, explain and apologize to participants?
- Are there participants from other time zones? If so, have their needs been considered?
- Do you include a description of the meeting that makes clear what the meeting purpose and goals are?
- Is the meeting invitation and materials sent out at least a week prior to the meeting?
- Did you ask potential participants for agenda items or ideas for the meeting?

- Did you include an agenda and all meeting materials in the calendar invitation?
- Is there information about and a contact person for ADA reasonable accommodations? See [DHS Required Accommodation Requests Language for Public Documents](#)
- Are interpreter(s), open captioning such as [CART \(Communication Access Real Time\)](#), or other accommodations needed? If so, have they been scheduled well in advance? Did you list what will already be provided on the invitation? As a reminder, accommodations including ASL interpretation and CART are required under the ADA and that cost shall not be a factor in determining whether you fulfill the request.
 - To request American Sign Language (ASL) interpreters and/or CART captioning, complete an online request to APD's Oregon Deaf and Hard of Hearing Services as early as possible with a minimum of 48 hours in advance at: <https://www.oregon.gov/DHS/SENIORS-DISABILITIES/SPPD/Pages/ODHHS.aspx>
 - For questions about current ASL or CART requests email request.odhhs@dhsosha.state.or.us
 - For general questions about accessibility and setting up accommodations email odhhs.info@dhsosha.state.or.us (goes to APD Policy Analysts)
 - Other ADA questions can be sent to the [ADA Unit](#) in HR.
 - For spoken language interpreters see pages 3- 5 of *the Language Access Service Guide*: <https://sharedsystems.dhsosha.state.or.us/DHSForms/Served/de0025.pdf>
- Is there a statement on who to contact if participants have technical questions or issues when connecting to the online meeting?
- Are there clear instructions and multiple options to join the meeting?
- Is there a backup plan if your primary meeting software fails?
- Is the meeting still necessary? If you cancel, be sure to give ample notification -- at least 48 hours.

AGENDA

Does the structure and method of meeting encourage inclusive participation?

- Design your agenda in a way that engages participants in multiple ways. You may want to use a combination of thought-provoking questions, virtual whiteboard exercises, mapping, polling, visualization to keep people's interest and attention.
- Have you allowed for the additional time that it might take to interact using multiple methods of communication? Does it allow for various communication needs/modes of your potential participants? (usually no more than 3 agenda items per hour)
- Are the agenda and meeting materials in accessible formats, use at least 14pt font (which is required under policy to ensure accessibility), and reviewed for plain language?

- Does your agenda include clear ground rules, community agreements, or meeting etiquette?
- Is the online meeting kept as short as possible? If it is over an hour are there breaks?
- Are agenda items framed as specific questions? For example: – What should our recommendation to leadership be about eliminating inequities in our program area?
- If you have scheduled CART or ASL interpreters, send the agenda and all meeting documents to the provider ahead of the meeting so they can understand the meeting content and take note of how names are spelled. Be sure spell out any acronyms.

PHYSICAL & VIRTUAL ROOM SET-UP

How accessible and safe are the physical and online “rooms”?

If it is necessary to include a **physical meeting location**, consider the following:

- Can the location safely accommodate the number of participants you will have physically present given the most current guidance from federal, state and local public health officials around COVID-19? How will physical distancing standards and sanitizing procedures be ensured? If the guidelines cannot be met, a physical meeting should not be held.
- Who will be the point person to ensure the smooth operation of the meeting at the physical location?
- Find a room equipped with a Skype smartboard or other remote meeting technology. ABLENet ERG has purchased an accessibility technology called [Meeting Owl](#) that can be sent to you. Contact Glen Bason in Facilities at GLEN.E.BASON@dhs.ohio.gov.
- Fully [ADA compliant](#) accessible facilities, including entry and restrooms.
- Meeting rooms with good lighting and acoustics
- Meeting areas large enough to provide space for interpreters, real-time captioning or CART setup, ample room for individuals using mobility aids, such as walkers, wheelchairs, or service animals to maneuver, and enough space for all participants
- Clear signage and maps that are understandable regardless of ability, culture or language
- Limited stimuli environment (consider the “busyness” of carpeting and wall coverings)
- Multiple sets of outlets in the meeting rooms for individuals using laptops or other electronic aids
- Easily accessible for those who use public transportation
- If meeting is held outside of State of Oregon facilities, choose a location that is welcoming of all people and is accessible and non-discriminatory in who it serves, particularly the LGBTQIA+ community.

Virtual Rooms

- The facilitator should familiarize themselves with the features of the online meeting software they will be using. [[Skype for Business Guide](#)]
- All users should login early enough to take care of any technical issues. A knowledgeable contact person should be listed in the meeting invitation to help participants troubleshoot technical issues.
- The meeting organizer should prepare a backup plan, such as a phone conference line, if the primary meeting technology does not operate as expected
- Ensure interpreters, captioning, and other accommodations are working and effective. Check-in with participants throughout the meeting to make sure that the accommodations and technology continue to be functional and effective.
- Find a quiet and safe place to call into the meeting. If you are driving pull over or wait until you get to your destination before joining a conference.
- Strongly encourage participants to enable all audio, video and instant messaging if technically possible. Use the audio-only option as a last option. This allows every participant to choose the manner of participation most effective for them.
- Facilitator should be trained in [trauma-informed](#) care, especially around historical and racial trauma in order to create psychological safety.

NOTETAKING OPTIONS

How will you capture the important ideas and decisions from the meeting?

- [Record the meeting as a video](#) if the function is available in your software. Participants should be notified in advance if you use this option. Also be sensitive to any concerns regarding confidentiality.
- Ask someone to take [written notes](#)
- As a less preferable option, utilize the captioning or CART file to create notes. This can be done by requesting a copy from the CART provider (with request submitted in advance) from the provider. However, the original CART file should never be sent to meeting participants as a substitute or in place of official meeting notes.

BUILDING COMMUNITY AGREEMENTS

What are agreements that explicitly foster belonging in an online forum?

Prior to or during your first meeting, it is imperative to set ground rules, community norms, and standards of online etiquette with your fellow participants. These should be sent out with the materials prior to each meeting and be reviewed at the beginning of each session. Sharing the agreements on screen is also recommended. Here are some examples and suggestions that you can customize for your meeting:

Community Agreements to Build an Inclusive Culture

The following are taken from the [Community Agreements developed by District 15's Equity and Inclusion Committee](#) - available from the OEMS intranet site:

- Confidentiality & Permission** - We agree to not share each other's stories or narratives without permission
- Fully Present and Patient** - We agree to listen to each other without distraction and without predatory listening.
- Default to Inquiry over Judgement** - We agree to be curious and ask questions before making judgements.
- Share the Air** - We agree to share our perspective, ideas, and narratives while allowing space for others to share their perspective, ideas, and narratives.
- Believe People's Narratives** - We agree to believe each other's perspective, ideas, and narratives.
- Reflection Intent/ Impact** - We agree to reflect on how our intent and impact may differ or align.
- [Repair Work](#)** - When our intent and impact do not align, we agree to acknowledge harm, make a commitment to improve, and ask what is needed to move forward.
- Self-Compassion** - When our intent and impact do not align, we agree to be compassionate with ourselves, understanding we are all lifelong learners.
- Invitation for Laughter** - We agree to laugh and have fun together.

Online Etiquette

- Log-on at least 5 minutes before the start of the meeting to troubleshoot any technical issues.
- All participants should enable and use all video, audio, and chat functions whenever possible. In times of social distancing, video helps participants feel more connected to others. Ensuring that you are also using and monitoring the chat box will help those who may have technical difficulties hearing or for people who may not feel comfortable speaking participate. Audio-only conferencing should be reserved as a last option.
- Announce your arrival (or early exit) to the meeting either verbally or in the text chat.
- Mute yourself if you are not speaking to eliminate echo and background noise.
- State your name whenever you speak.
- Do not interrupt or talk over others. This is especially important for virtual meetings as most software will shift the video display to focus on whomever is speaking.
- Speak slowly and clearly into the microphone.
- Give your full attention to the speaker, avoid distractions like email, web surfing, or texting. Be sure to silence your cell phone.
- For smaller meetings: For each agenda item, every participant will be given a chance to speak or pass before opening the floor up to general discussion. Note that the facilitator may wish to place a time limit on each person. Typically, at least going around the 'table' twice is recommended before moving to decision-making.
- For larger meetings: If you would like to speak instant message the facilitator to be recognized. If you don't have access to IM, wait until the current speaker pauses or finishes to politely ask to be recognized. The facilitator will keep a list of people who wish to speak.
- Stay on topic and follow the agenda and to avoid confusion.
- Don't forget to pause so notetakers, interpreters, and captioning can keep up. It also allows for people the opportunity to ask clarifying questions.
- Use plain language to help people better understand your message, especially when using an interpreter. Be sure to explain any acronyms or jargon that is used.
- Type questions into the group chat to be read by the facilitator.
- Read out loud anything that is shared onscreen, in the text chatroom or when referencing written materials. Remember that not everyone may have access to all modes of communication offered.
- Share or e-mail any documents used or referenced so participants can follow along.

WORKING WITH REMOTE LANGUAGE INTERPRETERS

- ❑ Any meeting materials should be [translated](#) and given to the individuals needing the interpretation service prior to the meeting.
- ❑ If possible, introduce yourself to the interpreter prior to the meeting. Politely ask if they need anything from you. Encourage the interpreter to ask questions and alert you to cultural misunderstandings or conflicts.
- ❑ When in the meeting, check-in regularly with the individual(s) who are relying on the remote language interpreter to ensure things are going smoothly for them.
- ❑ Acknowledge the interpreters presence in the meeting and ask participants to follow these best practices:
 - Speak directly to the participant, not to or through the interpreter.
 - Speak more slowly rather than more loudly.
 - Speak at an even pace in relatively short segments, remembering to pause so that the interpreter has time to interpret.
 - Assume everything that is said will be interpreted.
 - Use plain language and avoid jargon or acronyms.
 - Specifically ask the participant what they think during the meeting.
 - To check for understanding, ask the participant to repeat back important information.
 - Be patient as language interpretation can take more time.

INCLUSIVE FACILITATION

How will you create a space that ensures all people feel welcomed, listened to, and their ideas taken seriously?

- ❑ Greet each meeting participant warmly, by name, so everyone feels welcome.
- ❑ Consider opening the meeting with an [indigenous land acknowledgement](#).
- ❑ Clearly state the purpose and goals of the meeting
- ❑ Review community agreements, ground rules, and/or meeting etiquette at every meeting. This should have been sent prior with the invitation. See the previous section on “BUILDING COMMUNITY AGREEMENTS” for more information.
- ❑ Model and invite participants to share their [pronouns](#) during introductions. For example: he/him/his; she/her/hers; they/them/theirs.
- ❑ Use [people first language](#) as the default. For example: use “people with disabilities” rather than “disabled people” or “people of color” instead of “colored people.”

However, respect the wishes of individuals if they want to be referred to by another term.

- Ask for volunteer(s) to be an equity advocate during the meeting to ensure that equity, diversity, inclusion, and accessibility impacts are discussed. Ideally, the volunteer would have a deep background and interest in the subject matter. Do not always assume that the lone person of color, woman, LGBTQ+ person, or person with a disability should play this role. This role is as important a role as a notetaker or timekeeper.
- Review agenda and ask for any changes or edits
- Start with an [icebreaker](#) [2] get to know each other better or a short mindfulness [meditation](#) that helps the group center themselves.
- For smaller groups, call on each participant by name and give them an opportunity to speak or pass on each agenda topic before opening the floor to general conversation.
- For each agenda item, encourage participants use the Skype Room Chat box to submit comments or questions if someone else has the floor. Be sure to read them out loud after the person speaking finishes.
- Remind people that there are multiple ways of participating, keep checking in with participants to see how they are feeling or have something to say. Have a co-facilitator help you monitor the group chat.
- Invite people who wish to speak to instant message you, so not to interrupt the speaker.
- Keep the focus on one or two topics. If you must cover more items, then give people time to stretch, take a bathroom break, or replenish their coffee. Keep each segment of the meeting short - no longer than 30 minutes.
- Be vigilant of any stereotypes, [microaggressions](#) or harm in the meeting. Interrupt immediately and facilitate education and repair either during or after the meeting as appropriate. See [District 15 Equity and Inclusion Committee's Repair Tool](#).
- Pause to allow people to process and ask questions. Silence is ok in this forum as it gives folks an opportunity to think and allow folks to turn off their mute button.
- Offer a follow-up one-on-one call(s) with individuals who may need or benefit from it.
- Politely remind people of the community agreements when they interrupt others. Keep in mind research shows that women, people of color, and others are much more likely to be interrupted or not listened to. ([find out more](#))
- Repeat back or paraphrase what participants say. Listen and check for accuracy.
- Notice who has spoken and who has not. Invite them to share their thoughts. If the conversation seems one-sided the facilitator may want to ask: "What counterarguments might others have against this idea? Have we considered all angles to this?" This will leverage the diversity in the room to get you higher-quality decisions.

DECISION-MAKING

How do we consider equity issues and create buy-in for the team's decisions?

- Before making a decision, make sure everyone has had an opportunity to speak or pass.
- To avoid [groupthink](#), ask if the group can give counter-arguments for the other side.
- Do you have a [strategy for addressing intercultural conflict](#)? What if there is strong disagreement on a decision?
- From the beginning, be clear and transparent about the process for decision-making. Is it by majority vote? Consensus? [Something else](#)?
- Did the group [P.A.U.S.E.](#) and ask questions about how their decisions impact disparities, disproportionalities, and accessibility for various populations? (see other [equity lenses](#) used by local governments)
 - **PARTICIPATION:** Do participants reflect the diversity of the people we serve and do they feel fully included?
 - **ADVOCATE:** How can we be in ally-ship to support internal, interpersonal, institutional, and societal change for equity and justice?
 - **UNDERSTAND:** How does implicit bias, power, place, & historical trauma impact this situation? What are the unintended consequences? What does the data and community narratives say? Who benefits and who is disadvantaged by our decisions?
 - **STRENGTH-BASED:** How do our proposed solutions build on individual, cultural, family, and community strengths that empower people?
 - **ENGAGE:** How do people, families and communities prefer to be engaged at every step of the process?
- It can be difficult for people with intellectual or developmental disabilities or those who are experiencing trauma to make quick decisions. Be patient and allow the person to take their time.
- After every decision, ask individuals who did not vote for the majority-backed decision whether or not it is something they can live with and actively support. If they cannot, you may need to discuss and revisit the decision, postpone, or have a private meeting at a later time depending on the situation.

CLOSING & EVALUATION

How do we continuously improve and ensure we are on the same page?

- Review and confirm with the group all decisions made including timelines, parties responsible and any next steps.

- ❑ Ask some evaluation questions such as:
 - In one word, how are you feeling right now?
 - What went well in the meeting for you?
 - What can we improve next time?
 - What technology or human need can we assist with or support? What do you need to feel fully involved and engaged?
- ❑ Thank everyone for their time and flexibility. Recognize that everyone is doing their best given the extraordinary circumstances.

FOLLOWING UP AFTER THE MEETING

- ❑ Send out a thank you e-mail to participants and include notes, recording, or transcripts. Ask for any corrections to the record.
- ❑ Invite additional feedback or thoughts
- ❑ Remind participants the dates of any future meetings and next steps

ADDITIONAL RESOURCES

- Kathryn Heath and Brenda F. Wensil “To Build an Inclusive Culture, Start with Inclusive Meetings” *Harvard Business Review*. September 6, 2019. <https://hbr.org/2019/09/to-build-an-inclusive-culture-start-with-inclusive-meetings>
- Inclusive Meetings Presentations and Materials - <http://www.nevadaddcouncil.org/wp-content/uploads/2013/10/Accessible-Meetings-Presentations-and-Materials1.pdf>
- “Driving Toward Equity – Using Racial Equity Tools”, USDN: Urban Sustainability Directors Network (2015) <https://www.youtube.com/watch?v=P4yOV8apmlw>
- Leigh Thompson. “How to neutralize a meeting tyrant” *Fortune* (2013) <https://fortune.com/2013/02/11/how-to-neutralize-a-meeting-tyrant/>
- Running an Effective Teleconference or Virtual Meeting <https://www.cio.com/article/2437139/running-an-effective-teleconference-or-virtual-meeting.html>
- [OEMS Service Guide to Language Access](#)
- District 15 Equity and Inclusion Committee’s Community Agreements <https://dhsoha.sharepoint.com/teams/Hub-DHS-OEMS/Shared%20Documents/Workforce/Articles/D15%20Community%20Agreements.pdf>
- District 15 Equity and Inclusion Committee’s Repair Tool <https://dhsoha.sharepoint.com/:w:/r/teams/Hub-DHS->

[OEMS/ layouts/15/Doc.aspx?sourcedoc=%7B6AA0B1EC-9FBE-4DFE-ABF5-D715177D50AD%7D&file=D15%20EIC%20Repair%20Tool%20\(Final%20Version\).docx&action=default&mobileredirect=true](https://oems.com/ layouts/15/Doc.aspx?sourcedoc=%7B6AA0B1EC-9FBE-4DFE-ABF5-D715177D50AD%7D&file=D15%20EIC%20Repair%20Tool%20(Final%20Version).docx&action=default&mobileredirect=true)

- Best Practices for Communicating Through an Interpreter

<https://refugeehealthta.org/access-to-care/language-access/best-practices-communicating-through-an-interpreter/>