How to Plan and Run an Accessible and Inclusive Meeting

A quick list and explanation of the most important rights that Medicaid beneficiaries have in the Managed Care system

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PLAN

Planning meetings and events that are fully accessible and inclusive is essential for ensuring that all participants are able to meaningfully participate. In this guide, we highlight specific actions and examples that can make meetings more inclusive to all.

You also have the right for more information and help from the NC Medicaid Ombudsman. You can call them at **877-201-3750**, Monday through Friday, 8 a.m.–5 p.m. except state holidays. You can also email them at **info@ncmedicaidombudsman.org** and learn more at **ncmedicaidombudsman.org**.

Important details about the checklists:

Items marked with and highlighted in blue are specific to virtual meetings

Items marked with **VII** (Roman Numerals) include further examples in the attached Appendix

Plan Accessibility Checklist

Before the meeting:

❑ Send advance copies of all materials including agenda, slides, and 🖥 any materials that will be screen shared (at least 1 week in advance)

❑ Use large print (16 pt) and high color contrast on all materials to support members with visual impairments, limited use of pictures and graphics in presentation slides unless properly formatted for accessibility (including slides, handouts, agenda, etc.) **i**

❑ List in all communications the accommodations that you will automatically provide to ensure accessibility without the need for a request (ex. captioning, translation, etc.)

❑ Always invite participants to contact the meeting host for additional accessibility requests

❑ Allow participants the option to provide feedback or comments in advance of the meeting

❑ Use a 4th-grade maximum reading level for all materials. If a 4th grade reading level is not possible, provider a plain language explainer to accompany that specific material

❑ Avoid the use of jargon/slang/ acronyms in meeting materials

❑ Allow participants to submit their own questions or comments before the meeting

❑ Send any questions or items you want member feedback on 1 week before the meeting, and allow for multiple methods of response (in-person, call, email, anonymous form)

❑ Provide translated materials before each meeting

❑ 🖥 Ensure that the meeting host is trained on how to set up and implement the virtual meeting platform's accessibility features

❑ 🖥 Provide materials that help orient participants to your chosen platform. Offer practice sessions before the meeting

❑ 🖥 If there are any barriers or extra steps to joining the event, such as passwords or requiring the user to input information to join, make sure all attendees know and understand how to do so, and provide assistance

Plan Accessibility Checklist – Continued

Virtual Meetings:

- ❑ Make sure platform is compatible with assistive technologies used by disabled persons (e.g., screen readers, screen enlargement applications, closed-captioning, cognitive aids including computer devices, etc.) **II**

- ❑ Use platform with simple keyboard shortcuts for users who may not use a mouse

- ❑ Turn on chat, note, transcription, Q&A, or other features making participation fully accessible

- ❑ Allow for computer-based and phone-based audio listening/speaking

- ❑ Offer different ways that individuals can access the event, including via the Internet and dial-in.

- ❑ Ensure all callers get the chance to identify themselves, and rename numbers with names and pronouns when possible

- ❑ Use platform that has customizable interfaces so that anyone using screen readers or screen magnification can adjust the video windows as needed

- ❑ Offer the option for people using chat and/or Q&A functions to have their messages read aloud.

- ❑ Add Alt-text descriptions to all images and videos **III**

- ❑ Allow people to turn off cameras

- ❑ Have the meeting host only show the person presenting (including slides) , along with the active ASL interpreter

- ❑ Avoid flashing or strobing animations in presentation and materials

- ❑ Respond to access issues in real-time (captioning not working? interpreter not visible? on-screen information not accessible?)

- ❑ Mute other participants and presenters when not speaking to reduce background noise and distractions

- ❑ Assign a staff person assigned to address technical problems to and to raise questions/point raised in the chat

- ❑ Make sure all members have necessary technology, access to broadband, data needed to participate in the meetings. Provide members with data cards and/ or technology if unable to access independently.

- ❑ Provide training and support on any provided devices (eg. tablets, phones, or other accessible devices provided to to members) or accessing the meeting as needed

Plan Accessibility Checklist – Continued

During the Meeting (In-Person and Virtual)

❑ Provide live captioning: open or closed captions, live or auto-enabled transcription. Mode of transcription will depend on the features of the selected virtual meeting platform

❑ Provide live translation provide live interpretation, which most video and audio meeting platforms have available

❑ Use live ASL Interpreters

❑ Offer assistive listening devices, hearing or induction loops, and Communication Access Realtime Translation (CART) for attendees who are Deaf or hard of hearing

❑ Ensure interpreters stand in prominent, well-lit, visible space (e.g., raised platform with a dark, solid color background)

❑ Identify each new speaker by name

❑ Make sure all speakers can amplify their voice (microphones for in-person, 🖥 headsets with mics for virtual)

❑ Remind all speakers to speak slowly, clearly, and take pauses so attendees and translators can process

❑ Describe all images and videos

Plan Accessibility Checklist – Continued

Physical Meeting Space Requirements

- ❏ Rooms large enough to allow all persons to move about freely
- ❏ Wheelchair access: starting in the parking lot and, depending on the location of the meeting, extra temporary accessible parking may be needed. There should be a safe path of accessible travel into the building. The entrances and doorways need to exceed 🖥 minimum accessibility standards and preferably should have power-assisted door openers. Interior paths of travel should also be accessible. Meeting rooms should be near accessible restrooms. **IV**
- ❏ Wheelchair access to working tables throughout the room
- ❏ Barrier-free seating aisles that are wide enough (at least 36 inches) to accommodate mobility devices
- ❏ Room free of strong smells (perfume, cleaning agents, etc.), loud noises, and flashing/bright lights
- ❏ Barrier-free/step-free paths of travel
- ❏ Slip-resistant, level surfaces
- ❏ Well-lit areas; adjustable lighting
- ❏ Space for service animals (including access to toileting, watering, and walking areas)
- ❏ Video screens with closed-captioning
- ❏ Lactation room
- ❏ Gender-neutral bathroom
- ❏ Multiple sets of power outlets for laptops and other electronics
- ❏ Location of all audio/visual equipment in an area that does not block paths of travel
- ❏ Adequate number of spaces for mobility devices dispersed to allow location choices and viewing angles equivalent to other seating, with clear lines of sight
- ❏ Reserved seating near the exits for attendees who are sensitive to crowds and need to take breaks
- ❏ Seats for companions accompanying persons with disabilities

Plan Inclusivity Checklist

- ❑ Co-create group agreements: recognize and value multiple perspectives; assume positive intent; use "I" statements / speak from personal experience; confidentiality; no shaming or belittling others or oneself; minimize distractions **V**
- ❑ Make group agreements available in written form for each meeting, either on the agenda or as an attachment
- ❑ Reaffirm group agreements each meeting, edit as necessary
- ❑ Confirm language preferences prior to each meeting and provide translation both live in-meeting and written materials
- ❑ Be clear about meeting roles ahead of time so attendees have time to prepare
- ❑ State the goal of each meeting at the start of the meeting as well as in the agenda sent out in advance
- ❑ Make introductions using name and pronouns for all staff, participants, and speakers. You may opt to hold introductions in alternative ways such as in the 🖥 chatbox or through name tags **VI**
- ❑ Use written/🖥 typed name tag with full name and pronouns for all participants and speakers
- ❑ Create a member list with names, positions (if staff), pronouns, and pictures made available to all members in advance of each meeting
- ❑ Start and end meetings on time, no exceptions
- ❑ Use inclusive language during the meeting **VII**
- ❑ Be mindful of power dynamics in meetings **VIII**
- ❑ Be mindful of conformity bias, which occurs when people feel pressured to agree with everyone else in the room (Consider asking the group for differing viewpoints)
- ❑ Assign an "accessibility advocate" for each meeting to help ensure participants have what they need, address any issues or errors with accessibility (i.e. captioning, translation, etc), and 🖥 monitor the chat/ Q&A boxes
- ❑ Keep track of who's talking — and who's not. Exhibit zero tolerance for interruptions. Prevent anyone from dominating or derailing the discussion (including meeting hosts)
- ❑ Meet at a time that works best for participants (this may be after traditional office hours; early morning times may make attendance difficult for people with disabilities)
- ❑ 🖥 Ask attendees to use the "Raise hand" function during virtual meetings to reduce interruptions and allow everyone equal access to engagement
- ❑ Ensure attendees speak one at a time
- ❑ Allow attendees to contribute in the way they feel most comfortable (ex. Speaking up directly in the meeting, 🖥 including text-based contributions added to the chatbox, allowing contributors to send first and final thoughts via email before or after a meeting takes place)
- ❑ Assign a staff person whom members can ask questions to during the meeting for assistance on explaining substantive issues, use of acronyms, or other information.

# How to Plan and Run an Accessible and Inclusive Meeting

MEMBERS

Meeting accessibility is critical to make sure you are able to have everything you need to fully engage in each and every meeting. In this guide, we highlight specific actions and examples that can help make sure you're able to have meaningful access and fully participate in the MAC.

Important details about the checklists:

Items marked with 🖥 and highlighted in blue are specific to virtual meetings

Items marked with **VII** (Roman Numerals) include further examples in the attached Appendix
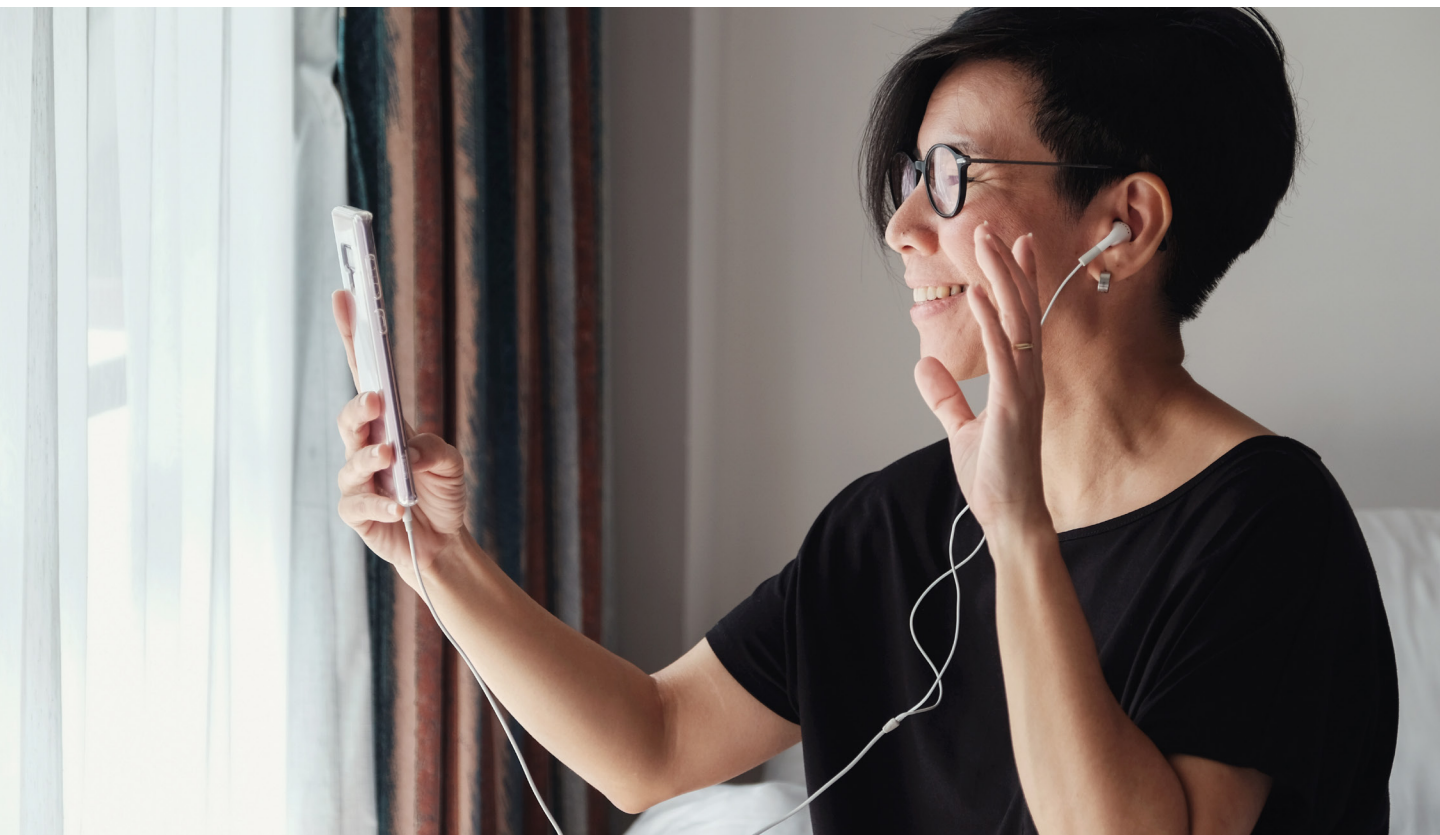
Members Accessibility Checklist

Before the meeting:

- ❑ Contact the meeting host if you have any additional accessibility requests
- ❑ Provide Plan staff any feedback or comments you wish in advance of the meeting
- ❑ Submit any questions, comments, or need for clarification (including clarifying terms used in materials sent in advance) to Plan staff before the meeting
- ❑ 🖥 Make sure you feel comfortable with the chosen meeting platform, including the platform's accessibility features. You may reach out to staff to to request additional support including practice sessions before the meeting
- ❑ 🖥 Note any extra steps to joining any web-based events, such as passwords or requiring user information to join. Reach out to Plan staff for additional assistance.

Virtual Meetings:

- ❑ You may want to test that the chosen platform is compatible with any assistive technologies you may use (e.g., screen readers, screen enlargement applications, closed-captioning, cognitive aids including computer devices, etc.)
- ❑ If you are using a call-in option to join the meeting, be sure to identify yourself so staff can note you are in the meeting and change your call in number to your name for other participants to see.
- ❑ Feel free to use chat and/or Q&A functions to engage with participants in the meeting. You may request to have your messages read aloud.
- ❑ Always feel free to turn your camera off throughout the meeting
- ❑ Make sure you are muted, or request assistance to be muted when you're not speaking to reduce background noise and distractions for other participants and presenters
- ❑ Let Plan staff know if you need technology support to access the meeting including access to broadband, data cards, or other technology.

Members Accessibility Checklist – Continued

During the Meeting (In-person and Virtual)

❑ 🖥 Plans should preemptively offer assistive technology and support, however we wanted to note that you may always request any support that allows you to fully participate in the meeting.

❑ Make sure you are able to see live captioning as needed, request assistance from staff as needed,

❑ You may request live translation. Let staff know if you have difficulty hearing the translator so the meeting may be paused while they address any issues.

❑ Live ASL Interpreters should be present for attendees. Let staff know if you have any trouble seeing them so the meeting may be paused while they address any issues.

❑ You may request listening devices, hearing or induction loops, and Communication Access Realtime Translation (CART) to ensure you can fully participate in the meeting

❑ Identify yourself by name for other participants

❑ When possible speak slowly, clearly, and take pauses so all attendees and translators can process

Members Inclusivity Checklist

- ❏ Co-create group agreements: recognize and value multiple perspectives; assume positive intent; use "I" statements / speak from personal experience; confidentiality; no shaming or belittling others or oneself; minimize distractions **IX**

- ❏ Reaffirm group agreements each meeting, edit as necessary

- ❏ Confirm language preferences prior to each meeting and confirm you have the translation support you need, both live in-meeting and written materials

- ❏ Make introductions including your name and pronouns. Note that introductions may be in the 🖥 chatbox or through name tags **X**

- ❏ Use written/🖥 typed name tag with full name and pronouns, request assistance as needed

- ❏ Use inclusive language during the meeting **XI**

- ❏ Identify who the Plan's "accessibility advocate" is for each meeting. They will help ensure you have what you need to participate, address any issues or errors with accessibility (i.e. captioning, translation, etc), and 🖥 monitor the chat/ Q&A boxes for any questions or comments you raise

- ❏ 🖥 Use the "Raise hand" function during virtual meetings to reduce interruptions and allow everyone equal access to engagement

- ❏ Feel free to contribute in the way they feel most comfortable (ex. Speaking up directly in the meeting, 🖥 including text-based contributions added to the chatbox, allowing contributors to send first and final thoughts via email before or after a meeting takes place)

- ❏ Identify the staff you can ask questions of during the meeting including any assistance needed, explaining terms and acronyms, content, or any other issues discussed in the meeting

APPENDIX

I   Plain, High Contrast Font Examples:
Making Text Design Accessible. UNCG Accessibility Resources Lab
accessibility.uncg.edu/getting-started-with-accessibility/accessible-design/

II   Choosing a Platform. Disability Rights
ncchild-my.sharepoint.com/:w:/g/personal/kaylan_ncchild_org/
EU8PGSFfaftHhf_W9T055egBdkIDXcJZ4-Ynj53s2kEM4g?e=40cPcz

III   Everything You Need to Know to Write Effective Alt txt. Microsoft
support.microsoft.com/en-us/topic/everything-you-need-to-know-to-write-
effective-alt-text-df98f884-ca3d-456c-807b-1a1fa82f5dc2

IV   Architectural Barriers Act. Accessibility Standards Sec. 401 Accessible Routes
access-board.gov/aba/#aba-401

V   How to Create Group Agreements. NYU
wp.nyu.edu/coaching/tools/group-agreements/

VI   Connecting Before Content. David Gurteen
conversational-leadership.net/connection-before-content/

VII   Using Inclusive Language. CDC
cdc.gov/healthcommunication/Health_Equity.html

VIII   Power Dynamics and Inclusivity in Virtual Meetings. Aspiration Tech
aspirationtech.org/blog/virtualmeetingpowerdynamics

IX   How to Create Group Agreements. NYU
wp.nyu.edu/coaching/tools/group-agreements/

X   Connecting Before Content. David Gurteen
conversational-leadership.net/connection-before-content/

XI   Using Inclusive Language. CDC
cdc.gov/healthcommunication/Health_Equity.html

For additional support see: GSA Section 508 Guidance for Creating Accessible Meetings
section508.gov/create/accessible-meetings/#meeting-management-techniques