



PLANNING WITH PURPOSE: AN EQUITY, DIVERSITY & INCLUSION CHECKLIST

This checklist helps you prioritize and embrace equity, diversity & inclusion (EDI) within your organization's event planning process. It includes promising practices adapted from [Equity and Inclusion – Learning Next Steps – An OpenCon Report on Conference Planning Version 1](#) and [Columbia Business School DEI Event Planning Checklist](#). Use this checklist as a tool to assist in identifying potential gaps and informing your organization's equity lens. This resource covers actionable steps that can be implemented to plan high-quality events that meet the needs of all. This is not an exhaustive list and can be customized for your training, webinar, or other events.

This checklist was created as an internal tool for applying an equity lens to the planning and implementation of the virtual national Rural Child Hunger Summit and to hold the planning committee accountable to our organization's steadfast commitment to EDI.

EVENT DESCRIPTION : This is the first step to articulating your event goals and EDI vision.

- ❑ Organize the planning committee. Be intentional about making sure the committee is representative of the community demographic that the event is meant to serve. This is a key element for success.
- ❑ Work with your community to develop event objectives. Outside input from community members is essential, especially if you are unable to ensure adequate diversity within the planning committee.
- ❑ Gather input from community members who are the intended audience of your event (e.g. members with lived experience, stakeholders who represent the community, etc.).
 - Community input serves as an accountability piece; to make sure this happens, incorporate this document into the planning and make sure that these items are discussed throughout the planning process.

EVENT DETAILS : This step tells the story of your event and outlines intentions for your EDI vision.

- ❑ Include date, time, and location.
- ❑ Create a clear picture of your audience
- ❑ Add in workshop/event details.
- ❑ Add in the organization/team that is organizing the event.
- ❑ Ensure representation at all levels:
 - Team - Are various identities represented (e.g. gender identities, diverse racial backgrounds, geographic regions, and roles within the organization) on the planning team? Are all voices being represented in discussions?
 - Sessions - Plan for diversity, equity, and inclusion. Ensure gender and race/ethnicity is balanced within each session (especially keynotes and plenary speakers), not just the overall program.
 - Presenters – Include speakers from a wide range of contexts. Factors to consider include gender identities, racial groups, geographic region, ability, sexual orientation, and career stage.

MODERATOR/SPEAKER SOURCING AND SELECTION : During this step, it is important to include language on the topics you will be addressing to gauge comfort levels and communication skills to see if they are a good fit.

- ❑ Ensure proper time to research and source representative moderators, speakers, and panelists.

Resources for speakers include:

- Suggestions from past speakers— ask your past speakers for their recommendations, noting that you'd like to increase your outreach to diverse leaders in their industry/field.
- Seek recommendations from EDI committees and other thought leaders within the organizations.
- Compensate speakers and be transparent about their fees e.g., have plenary speakers submit fee scale and pay all main speakers consistent compensation amounts.
- Actively solicit proposals and submissions from underrepresented groups.

INVITATIONS TO MODERATORS/SPEAKERS : This step allows you to track your progress.

- ❑ As part of the formal invitation, specifically include language on individual EDI issues you would like speakers to address to gauge their comfort levels and fit for conversation.
- ❑ Request demographic information from moderators and speakers for tracking purposes (e.g. gender pronouns, race or ethnicity and education information). Some guidance for requesting this information is as follows: Once your speaker has confirmed, add language to your bio/headshot request to ask for demographic information. You can expressly state:

“Please provide demographic information to the extent that you feel comfortable sharing. This includes gender pronouns, race or ethnicity, and education information. Please know that this is voluntarily being collected to better track our efforts as a part of our EDI initiative and is not a mandatory requirement for participation in our event.”

PROGRAMMING DECISIONS : As you build out your program, it is very important to think through these important elements:

- ❑ Determine your program objectives as they relate to EDI. For example, intentionally design sessions to openly reference EDI and why it is important and integrate it into the work.
- ❑ Ensure underrepresented perspectives are prioritized in all aspects of the event, and especially in dialogues about EDI. For example, make sure these groups and individuals are on the main planning team and those conversations are structured so that all voices can be heard. Some individuals may need to step back to allow others to step forward.
- ❑ Incorporate participant input into program choices (e.g. surveys, session proposals, verbal feedback, and previous evaluations).

ACCESSIBLE CONFERENCE MEDIA & INCLUSIVE ENGAGEMENT : Assessing your audience communication needs is key to a successful event.

- ❑ Have facilitators monitor who is asking questions so that all voices are heard.
- ❑ Make materials (e.g. video recordings, slides, notes) freely available online to view after the event. This is especially useful if live streaming is not possible.
- ❑ Provide all media in alternative formats like transcripts (or detailed notes) for video-recorded material and closed captioning during live streaming.
- ❑ Allow alternative ways to participate in Q&A (e.g. via chat, online question submission via Twitter or another online platform).
- ❑ At least 6-8 weeks before the event, encourage speakers to review guidelines on designing easy-to-read slides. The Web Accessibility Initiative offers helpful information about [How to Make Your Presentations Accessible to All](#).
- ❑ Offer appropriate language translation during all sessions if a participant has indicated this accessibility requirement in advance.

PRE-CONFERENCE COMMUNICATIONS ON ACCESSIBILITY & OTHER INFORMATION :

It is very important to communicate with your audience in advance the accommodations that are being made.

- ❑ 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 to reach out to ask what is available.
- ❑ Communicate the schedule and agenda in advance so participants can communicate any accommodations they will need (e.g. long conference days/events may not be possible for those with certain health needs).
 - Ensure event promotion language and visuals are inclusive for target audiences.
 - If planning a virtual event, provide a guide to using Zoom (or another online event platform) and pre-recording guidance for speakers.

DURING THE EVENT :

- ❑ Consider asking participants to communicate their preferred pronoun (he, she, they, etc.) in introductions or Zoom names
- ❑ Consider offering closed captioning or language translation and explain to participants at the top of each session
- ❑ Make sure adequate breaks are provided throughout the event to accommodate those with health or other personal needs

AFTER THE EVENT :

- ❑ On the event feedback form, include a question on whether participant accessibility needs were met.
- ❑ Send a post-event survey that asks about inclusion and accessibility at the event. Here are some post-event survey sample questions:
 - “The event included a variety of viewpoints.” (Rate from "Strongly Agree" to "Strongly Disagree" on a 5-option scale).
 - “The event speakers/moderators were representative of a wide range of identities.” (Rate from "Strongly Agree" to "Strongly Disagree" on a 5-option scale).
 - When applicable, “The event expanded my capacity to think about diversity, equity, and inclusion-related topics.”
 - When applicable: “My accessibility needs were met during the event.” (Yes, No, Not applicable).

This checklist is not all encompassing. No Kid Hungry is striving to make our events more equitable and accessible to all persons. If you have ideas on how to create equitable spaces, please share them with us at bestpractices@strength.org.

