



A TOOLKIT FOR CREATING
RADICALLY
INCLUSIVE
GRASSROOTS
EVENTS

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TRANSGENDER PROFESSIONAL
ASSOCIATION FOR TRANSGENDER HEALTH

THE PEOPLE BEHIND THIS TOOLKIT - LEADS



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He is a researcher, activist, and student at the University of Toronto, where he is completing a PhD in Adult Education and Community Development.

Noah's PhD work expands on his book (**Trans and Autistic: Stories from Life at the Intersection**) by exploring the development of transgender/autistic communities. Check out his website for more info, www.noahjadams.com



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She holds a PhD in Population, Health and Place from the University of Southern California and is a Co-founder and Distinguished Fellow of the independent, non-profit Center for Applied Transgender Studies. Her work has been published in journals ranging from **Hypatia: A Journal of Feminist Philosophy** to the **Journal of the American Medical Informatics Association**. More info can be found on her website, www.averyeverhart.com



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He is a fellow with Argentina's National Scientific and Technical Research Council (CONICET) and the Center for Applied Transgender Studies. He holds teaching positions at the undergraduate and graduate levels in geography and gender studies.

His doctoral research focused on cisnormativity and ableism in public urban spaces, their effects on everyday life, and trans and disabled activism aimed at broadening access to the city. His publications can be found at www.aacademica.org/fernandez.romero

THE PEOPLE BEHIND THIS TOOLKIT - COLLABORATORS

Ten collaborators contributed to this toolkit. We have named those who wished to be identified.

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Germany

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Laur Eliza is a project manager working with refugees and recent immigrants and a trans advocate with a passion for community building. Her background is in political sciences with a focus on identity construction, diasporas and genocide.

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THE ORGANIZATIONS BEHIND THIS TOOLKIT

TRANSGENDER PROFESSIONAL ASSOCIATION FOR TRANSGENDER HEALTH (TPATH)

We created this toolkit and the conference that inspired it (*Converging Crises: Transgender Health, Rights and Activism in 2021*). You can find out more about us at www.tpathealth.org and reach out at leadership@tpathealth.org.

OUR SPONSOR: EQUALITY, DIVERSITY AND INCLUSION IN SCIENCE AND HEALTH (EDIS)

EDIS is a coalition of thirty member organisations driving collective action across the science and health sector. We advocate for systemic change through collaborative action, knowledge-sharing and co-creation with our membership and the wider community. We understand equality, diversity and inclusion in science and health as a social justice issue—our vision is for everyone to have equitable access to science and health research and its benefits.



FOREWORD

Converging Crises: Transgender Health, Rights and Activism in 2021 was the Transgender Professional Association for Transgender Health's (TPATH) inaugural conference. It was a labor of love and the culmination of several years of work, starting with the creation of TPATH in 2016. TPATH members had asked for a conference to be held from the very inception of the organisation. Many pointed out that no similar conference existed and that opportunities for transgender and non-binary (TNB) folks to meet, share ideas, and support one another were rare, manifesting where they did as stolen moments in conference hotel rooms and restaurants on the peripheries of events held by larger events focused on cisgender clinicians (e.g. World Professional Association for Transgender Health). We wanted a space that was just for us, where we were the majority, and where our concerns about our bodies, rights, and work in this field were privileged.

TPATH 2021 was that conference. Its realisation, however, was not easy. While devastating, COVID-19 provided an explosion in online event technologies and, perhaps more importantly, a normalization of virtual events. It is not an overstatement to say that we may never have been comfortable taking the leap without these existing pathways. Along the way we discovered that a virtual event presents many more opportunities for accessibility alongside a reduced cost. While we hope to hold our next conference in person, the inclusion of a virtual aspect is now non-negotiable for this very reason of accessibility, especially with regards to disabilities and especially with regards to accommodating disabilities and working with multiple languages.

This toolkit outlines how we realized this conference, describing what steps we took, the greatest challenges and successes we faced, and our insight into how one may conceptualize and run a similarly accessible and grassroots event. While we did not meet all of our goals and there is clear room for improvement in all areas of the process, *Converging Crises* was a tremendously successful event. At the outset, we hoped for fifty to a hundred participants—instead we ended up hosting more than 500. We also entered this project with significant financial concerns and preparation to take on personal debt in order to realize the conference—in the end we made \$15,000 USD from conference fees, in addition to securing several grants to help cover running costs. This money enabled us not

just to pay contractors, but also to offer significant honorariums to speakers from underrepresented areas and localities (e.g. by race, ethnicity, geography and other intersectional factors).

This success came with tremendous challenges. Like many other community-led groups, we have been historically blocked from resources and from leading positions in conversations by and about us. A lot of people told us, and will tell you, that an event like this isn't needed, or maybe isn't even possible. Maybe you are even telling yourself this. The thing is, people who say this are often really saying that they can't do it or even that they don't want you to. This doesn't mean that you should listen to them and take their advice. It also doesn't mean that you should give up on trying. **Do it anyway.** You're going to make mistakes. Come to terms with that and be humble when folks call you out. Sometimes people will react with hostility. Sometimes hurt people hurt people. You can set the tone of the conversation (and it is a conversation) with how you respond. Start with the understanding that (almost) everyone's view is valid and rooted in their own specific perspective (e.g. geographic, ethnic, racial etc.).

As an established and community-led organization, TPATH was fortunate to have already earned the goodwill of our community, which allows us to make mistakes, learn, and do better. Through this guide we want to help you earn this goodwill as well. At times the work felt impossible and overwhelming, but as always, the first step was the hardest. Undertaking a project like this is more than a challenge: it is a substantial risk. One that is not equal for all people. In reading this guide, we hope that you will find the information you need to take that first step.

A quick word about how this resource was created

After our conference ended we were contacted by the Equality, Diversity, and Inclusion in Science and Health (EDIS), which is hosted by Wellcome Trust, with a generous offer of funding to create this resource and an accompanying workshop. In order to do so we held 3 online meetings with an open call for individuals who had helped organize the conference, volunteer during it, or expressed an interest in helping but were unable to do so. The first meeting involved volunteers and

FOREWORD

members of the Steering Committee; the second core organizers; and the third those who had expressed an interest in joining the Steering Committee but had dropped out early in the planning process. We initially planned to hold a fourth meeting, however after the third we found that we had reached saturation with both the information we were getting and the individuals participating. Francisco and Avery coded the resulted meeting minutes according to the topic discussed. All participants received an honorarium for each meeting they took part in.

These meetings encompassed 13 people from 9 different countries (Argentina, Botswana, Canada, France, Germany, the Ivory Coast, the Netherlands, the United Kingdom, and the United States). Others had indicated an interest in participating but were unable to do so because of prior commitments and issues regarding organizing across multiple time zones. The most common subjects discussed were global inclusion, accessibility, division of labor, technological challenges, and the need for more intentionality and process-related support. Generally speaking folks were happy with the overall intention and accessibility of the conference, but highlighted the need to focus less on deadlines and funding requirements and more on intentionally creating an international community.

The third meeting was the most fruitful, highlighting how some individuals from the Global South and non-English speaking communities had been excluded from participation early on due to a need to prioritize local activism, difficulties with translation, and a lack of intentionality around ensuring communication was in Spanish and French as well as English. As noted by one of our collaborators, another important consideration in organizing an international event like this is structural inequalities between how TNB folks interact with academia in the Global South vs. the North. In the former for instance, there are very few TNB people in university settings, whereas the opposite appears true in the North.

In this final Toolkit meeting, one participant noted that our “*priority shouldn’t be deadlines themselves or certain timelines, but... on us organizing something for ourselves and when we [focus on] timelines we can easily miss out on our own priorities (S, Ivory Coast).*”

Happily, the fact that we were able to have this “*frank conversation [was appreciated and seen as] inspiring confidence in doing this again... and actually working together in a meaningful way (N, Botswana).*”

Ultimately, while our conference fell short in some critical ways, we were heartened to find that we had created something meaningful and important and that the goodwill we had built with the larger community was enough to encourage folks to work with us again and get it even more right. This toolkit, and the meetings that led up to it, are a first step towards that goal.

And a final nota bene. Our conference was an academic one, and so we used a lot of that language (e.g. abstracts, proposals, conference). You will see that reflected throughout this toolkit. Please do not make the mistake that it is only relevant to this kind of event. This information is just as applicable to any kind of grassroots community event, whether it is artistic, political, activist, academic, or a combination of all four!

In solidarity,

Noah Adams, Avery Everhart, and Francisco Fernández Romero
TPATH Conference Organizing Team

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CORE PRINCIPLES



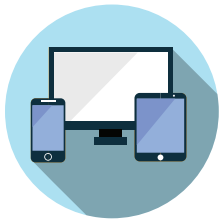
1. Accountability and Transparency



2. Build Relationships to Build Capacity



3. Prioritize Accessibility



4. Integrate Technology Where It Meaningfully Adds Value



5. Enable Meaningful Participation For Everyone



6. Demonstrate Your Ethics With Your Budget



7. Center the Global Majority



Commit to accountability and transparency in all aspects of your work.

Create and maintain clear expectations.

While your individual circumstances, funding, and legal situation will influence this, it can be very helpful to provide a transparency page on your event website regarding aspects of your process such as funding, recruitment, and global and demographic makeup of leadership. Some organizers may not wish to be named for privacy and security concerns. In this case you can include a footnote stating this.

Demonstrate your trustworthiness. Participants, volunteers, and co-organizers may rightly be suspicious of your motives if they are not familiar with your organization or the work you are doing. It is important to hear all concerns and even hostility in order to build trust. You will be judged by your actions and the grace with which you hear and respond to these concerns.

BUILD RELATIONSHIPS TO BUILD CAPACITY

Focus on creating solid, long-term relationships with people and groups that further both your organization's capacity and their own.

Do targeted outreach as needed and try to ensure that the voices of the Global North don't overtake those of the global majority. Intentionally reach out to underrepresented individuals and groups and prove yourself trustworthy to them.



It is not enough to simply extend invitations, it may also be necessary to help organizations build capacity to respond to the bureaucratic aspects of their participation in the event.

PRIORITIZE ACCESSIBILITY

Making your event accessible begins with planning and is carried through the execution and post-event debriefing. Communication is critical here.

Prepare monolingual attendants and especially Anglophones for being decentered in a multilingual space. These individuals are often catered to in international meetings and may be unprepared for this. In our conference this was particularly noticeable where translation was relayed through Spanish. As a result Anglophones had to wait and often reacted with surprise and anxiety.

Presentations should have transcription and/or captions. This was the single most requested accessibility accommodation and represented a good 25% of our participants. Interpretation for live meetings means little if the written communications for your event (including captions at live meetings) aren't also translated.

Clearly communicate time commitments and expectations for participants and from organizers (e.g. breaks, check-ins, internet connectivity).



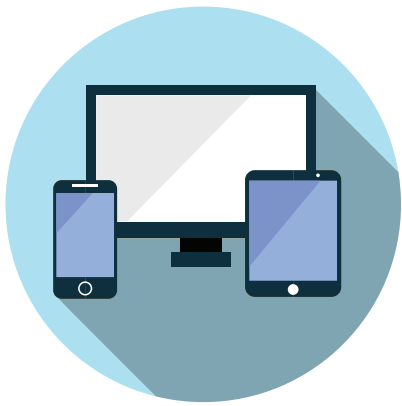
Alternating time zones for meetings can be another way to move toward equitable practices in organizing with global partners.

If at all possible, plan to record and share sessions as quickly as possible after they are held (we shared ours on YouTube). Remember to take into consideration privacy and safety concerns and get and reaffirm permission to record and share presentations.

Request that each speaker delivers a copy of their presentation ahead of time so that it can be translated and available to be shared during the the event. This will require close attention to planning and tight deadlines. You WILL have to pester people to stay on this.

Center disabled people* in your planning and agenda.

**We have used identity first language intentionally, as unlike person first language (e.g. person with a disability) this form acknowledges that disability can be considered inseparable from a person and their identity (Klantz, 2020).*



Consider your organizing needs when selecting communication platforms.

Do you need multilingual support?
Will the platform be your main mode of communication?

Can you use free and open source solutions, or do you need to pay? Will you use different platforms for organizing and for holding the event? Can you solicit feedback via these platforms? Do they allow you to hold participants accountable and keep your event secure? Are these platforms or softwares equally accessible to all participants? Sometimes social media or tools like WhatsApp can be the single most accessible option to all participants.

Consider your relationships with suppliers and other organizations. Do their values match yours?

...WHERE IT MEANINGFULLY ADDS VALUE

Virtual and in-person events cater to different groups. If you're hosting a hybrid event you will have two audiences engaging with the content in parallel but different ways. While you can't apply the same techniques and processes to both, you can and should ensure that they get the same basic outcomes. Make sure you don't prioritize one stream over the other, or worse, include virtual as an afterthought.

Hold Sexual Orientation, Gender Identity and Expression, and Sex Characteristics (SOGIESC) trainings for hosts/facilitators to ensure inclusivity and recognition of gender diverse participants.

Virtual and hybrid conferences can powerfully enable participation from individuals in the Global South and with accessibility considerations. However, the internet is not equally available or equally powerful everywhere. Throttled or limited internet speeds can be very frustrating and even prevent participation. Develop a plan for this. For instance Zoom enables meeting participation by phone. Consider how you can make this work for presenters.

ENABLE MEANINGFUL PARTICIPATION

Being open and transparent in communication among and between organizers and participants enables everyone to feel equipped to ask for what they need so that they can participate how they want to.



Even when planning for every possible scenario or outcome, organizers may encounter unique or unanticipated accessibility needs and requests.

Create a feedback mechanism that allows participants, presenters, and organizers to give feedback, including critiques of decisions and power imbalances.

Create a protocol for conflict resolution both within the organizing team and at your event.

Make sure to share what you have learned with the community!

DEMONSTRATE YOUR ETHICS WITH YOUR BUDGET

How you choose to spend your resources, whether it's funds, time, or labor, reflects your priorities.

Consider building honoraria into your budget to meaningfully reimburse volunteers and speakers for



their time. Doing so will help to develop trust and goodwill within both the organizing team and the wider community and enable participation from marginalized individuals and groups.

For projects with smaller budgets, consider whether you can proceed at all if it means that you will have to assume a net loss.

For projects with teams that haven't worked together before, or for those with multiple organizations or stakeholders involved, transparency over costs builds trust and enables accountability for resource allocation.

You will have to make tough choices about what line items to prioritize. Make your budget reflect your ethics!

CENTER THE GLOBAL MAJORITY

Centering the perspectives of the global majority (those based in the Global South, Black and Indigenous people, and other people of color) and is one way to build equity, combat structural and interpersonal barriers to meaningful participation, and create accountability among organizers.

In practice, this means not just affirming the perspectives of all involved, but meaningfully and consistently focusing on the impact each decision will have on marginalized people within the organizing group and in the community at large.



STEPS TO A SUCCESSFUL EVENT

DEBRIEF

ENVISIONING YOUR EVENT

GETTING ORGANIZED

BEFORE THE EVENT

DURING THE EVENT

STARTING QUESTIONS

- **What's the focus/theme/goal of your event?**
 - Do you want to have a single meeting? A scientific conference? A workshop? Are you going to meet to create a written text? This is the most important question. It determines the whole purpose of your event and should be the focus of a separate meeting before you do anything else.
- **Who's the target audience of your event?**
- **What format will it take? For instance will you be hosting it virtually, in person, or a hybrid of the two?**
 - In person can have better opportunities for folks to collaborate, but it is also more expensive and can be less accessible.
- **How will your team operate (e.g. horizontal leadership, an executive board/committee, organizers come in and out, etc.)? Is everyone clear with this?**
- **Who among the organizers will take the reins and responsibility if necessary?**
- **What external contacts and outreach might you need to do to ensure a successful event?**

PRESSURE POINTS TO KEEP IN MIND

- People may gravitate to specific tasks naturally, but most will need direction. Try to strike a balance between delegation and volunteering.
- Consider having a lead organizer or project manager whose main focus is on the 'bottom line', ensuring things get done.
- Language will quickly become an issue if operating multilingually (which we strongly recommend); contract interpreters and translators early on.
- Speak to organizers of similarly themed and sized events.
- Be aware of and reflect on possible power dynamics within your team and ensure you're not replicating the same structures you're trying to combat. For instance, by expecting the most junior team member to take minutes or individuals from marginalized communities to represent their whole community and/or do additional labor in order to ensure their perspective is considered.

RELATIONSHIP AND CAPACITY BUILDING

Ideally, your team will draw from pre-existing relationships and contain people from the communities you want to include. However, your event might also aspire to develop new ties between communities. This will entail reaching out to folks who are involved in the particular communities you want to work with. Create medium and long term goals here. It may not be possible to attain all these goals in a first meeting and can be easier to do over 3 or 4 meetings or even events.

- Make sure these relationships aren't extractive: your collaborators should get as much out of the partnership as you do.
- This takes time! You're aiming to build sustainable, long-term relationships. Get to know each other, build trust, and learn from each other.
- These relationships are key to ensuring that the event is relevant, accessible, and sensitive to each community's needs and interests.
- Consider offering honoraria to team members. This can help to bring in and sustain the participation of more marginalized individuals. Remember that not all people have economic contexts that allow them to dedicate time to work as volunteers and in those cases we recommend that the tasks be paid fairly.

Organizing an event may involve many more roles than you initially thought! Here's a list of some important jobs that need to be done:

- **Project Coordinator/s** (2-3 is best)
- **Financial Lead** (e.g. budget management)
- **Fundraising and Grant Application Lead** (independent if at all possible, but works closely with Financial Lead)
- **Technical Lead** (e.g. website and platform management)
- **Social Media Lead** (could be independent, but will work closely with Technical Lead)
- **Volunteer Lead**
- **Accessibility Lead**
- **Community Lead** (responsible for collecting & prioritizing feedback before and during your event, to make sure information from participants gets where it needs to be)
- **Event Handbook/Primer Creation Lead**
- **If your event supports several languages:**
 - **Language Lead**
(dedicated contact person in each supported language)
 - **Translation and Live Interpretation Lead**

GETTING ORGANIZED: SAMPLE TIMELINE TO EVENT

This timeline is a sample and your own will be much more detailed. Don't be afraid to adapt and change it as needed.

AT LEAST 18 MONTHS BEFORE EVENT

Conceptualize the event. Spreadsheets will be your best friend from here on out.

MONTHS 1-3

Gather your team and begin building relationships with them. This includes contracting multilingual interpretation and translation for meetings if needed. Note that securing translation and interpretation was surprisingly difficult and took us the most time. Complicating factors can be things like relay languages and the time zone of the event vs. the translation/interpretation team. Asking for introductions and referrals from fellow organizers can be very helpful here.

MONTH 3

Agree on event budget and theme.

MONTHS 3-6

Begin drafting public materials, such as a request for proposals or call for papers.

MONTH 6

Set a date for your event. It should be at least a year from this time.

MONTHS 3-6 / CONTINUOUS

Begin organizing paid staff and volunteer support teams. This will be a continuous process, with an opportunity to recruit volunteers in the registration form and onboard folks as needed closer to the conference.

MONTHS 3-12

Contract suppliers (e.g. translation, meeting software, hotel, food, accessibility tools etc.).

MONTHS 6-12

Contact and schedule keynote speakers as far ahead as possible, but at a minimum start in **Months 6-12**. This is a process and will require back and forth conversation.

MONTH 12

Send out your call for proposals no later than this date. The deadline should be 1-2 months after (**Months 13-14**). Keep a secret fallback date in reserve so that when the deadline passes you can offer an extension (1 month, or **Months 14-15**). This is because many folks assume that the first deadline will be extended. Only do this once and be very clear in all materials that this is the final FINAL deadline!

MONTHS 12-14

Open registration. Your registration process and platform, if any, needs to be ready by this time.

MONTHS 14-16

Send presentation acceptances. Give yourself a month for this. This is a tight turn around and something most conferences postpone. However, it's important to stick to the timeline in order to allow folks to make plans and for you to make the event schedule. The key to meeting this deadline is planning and recruiting volunteers to review proposals (if this is your style of conference). You can ask for this in the proposal process.

GETTING ORGANIZED: SAMPLE TIMELINE TO EVENT

MONTHS 15-17 / EARLIER IF POSSIBLE

Create and post event schedule. This will necessitate coordinating design and translation teams.

1-2 WEEKS TO EVENT

If event is virtual create at least 2 times for attendees to test out the meeting platform. Mostly this will consist of organizers hanging out in the room and letting folks test out the features. This is a good time to answer folks questions about the events and you can (and even should) advertise it as this.

YOUR EVENT

While you've done an incredible amount of work up to this point, this period of perhaps 1-3 days will be the most intense. You'll be problem solving and putting out fires, dealing with late registrations, potentially fixing time zone problems and Zoom outages. You may have to deal with Zoom bombings and trolls, so you should have a plan for this.

You'll get slicker as you go, for instance in your opening/closing virtual meeting rooms, turning on settings (e.g. captions, translation), introducing presenters, and giving accessibility information. A good tip is to have more than one moderator for each session. Have a back channel in order for moderators and other volunteers to communicate (e.g. WhatsApp group).

Consider having a separate channel for presenters, so that information like time limits can be shared.

1-2 MONTHS AFTER EVENT

Congratulate yourself! You've done an incredible job. But it's not quite over. You need to send out thank yous to presenters and volunteers, make sure everyone gets their honorariums, pay* your contractors, and deal with any remaining questions or concerns brought up during the event. You should also hold a debriefing session with volunteers and organizers 1-2 months after. This is a good point for the team to start writing down all their thoughts and impressions about the conference. What went well? What could have gone better? What would you do next time?

** International payment can be a particular challenge, as services like PayPal won't work with folks in all countries and will sometimes refuse to work for folks in the Global South for seemingly no reason. You may have to pay folks with International Wire Transfers. These can be expensive, but it's important that your organization shoulder the cost, rather than leave the recipient to pick it up. It's a good idea to inquire whether they have to pay a fee for this in their country, as it's not always obvious. Another consideration is that some countries have fraud/money laundering laws that make it difficult to receive international funds, or funds from specific countries. To our knowledge there is always a way to get someone their money, but it may involve persistence and some creativity.*

GETTING ORGANIZED: SAMPLE TIMELINE BY MONTH

1	2	3	4	5	6	7	8	9	10
SO YOU WANT TO HOLD AN EVENT									
GATHER YOUR TEAM AND FIND INTERPRETATION / TRANSLATION									
		SET EVENT THEME / BUDGET							
		DRAFT MATERIALS (REQUEST FOR PROPOSALS)							
		ORGANIZE PAID STAFF AND VOLUNTEER SUPPORT TEAMS							
		CONTRACT AND SCHEDULE KEYNOTE SPEAKERS CONTRACT SUPPLIERS (TRANSLATION, SOFTWARE, HOTEL, FOOD, ETC.)							
					SET DATE				

11	12	13	14	15	16	17	18	19	20
	CALL FOR PROPOSALS			EXT.					
	OPEN REGISTRATION								
		SEND ACCEPTANCES							
		CREATE AND POST EVENT SCHEDULE							
						VIRTUAL Q&A			
							YOUR EVENT		
								DEBRIEF AND SETTLE ACCOUNTS	

BEFORE THE EVENT: FIRST STEPS

1. The first and most important decision is format. Will you be hosting your event virtually, in person, or a hybrid of the two? Almost every decision you make about logistics from this point forward depends on the format. For example, a virtual event will need to state the time zones in which it intends to operate, an in person event will need space to satisfy the volume of participants expected, and a hybrid will have both issues and perhaps more.
2. Will you be expecting registrants and attendees to pay to participate? If so, consider asking those based in the Global North or with higher incomes to donate the cost of one or more registrations on top of their participation fee to be made available to those based in the Global South or with lower incomes. If operating in more than one country, decide your core currency now to avoid miscommunications and prepare for logistical difficulties in moving funds across borders.
3. Begin budgeting and organize your expenses into broad categories, even if you don't have every line item figured out. Overestimation of costs is better than underestimation. There are also different costs associated with different event formats. Consider the following:
 - a. **Technology:** Web-based programming will need a central platform, which may cost more than you expect. You may also need to provide or rent analog technology like mics, speakers, projectors, and screens for live events. Another possibility is to have this equipment available to lend to virtual participants who need it.

- b. Labor and Personnel:** Consider which roles, whether coming from the core organizing team or from externally contracted personnel, must be compensated. Highly specialized skills such as translation and interpretation will be expensive. Other roles like project management may be considered part of the purview of someone's employment if they work for the sponsoring organization.
- c. Honoraria:** At a minimum you should be prepared to offer honoraria to keynote speakers, especially if your event has a registration fee. You should also consider offering them to all presenters and even participants, especially if they are from a particularly marginalized community and/or geographic location. Your capacity to do so will differ depending on your circumstances, but this may range from providing free registration up to paying for flights and accommodation at a live event.
- d. Logistics and Accommodation:** In person events will need to be booked well in advance and this will often be the most expensive line item. Ideally you would secure discounted group rates for accommodation in addition to the event spaces. This can also be done if using regional hubs for hybrid events in which people from nearby areas gather to attend and participate virtually together. For purely virtual events, this may be folded into the technology costs.

BEFORE THE EVENT: LINGUISTIC ACCESSIBILITY

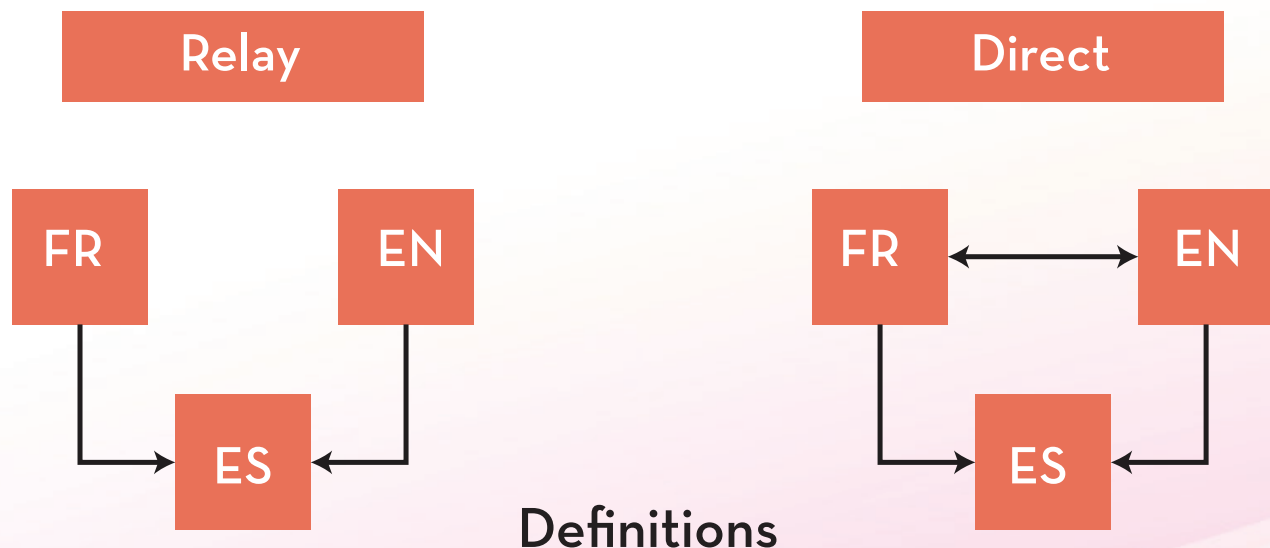
1. Effective communication relies on both conveying and receiving information, and is essential to the successful experience of attendees and participants. The key takeaway is to be open to feedback and requests for specific accommodations. Here are some ideas based on what worked for us.
 - a. **Captioning:** Live captioning is preferred. Remember, though, that this is a highly specialized skill for which captionists and transcriptionists should be well compensated. Automatic captioning technology exists for some video conferencing software (e.g. Zoom), but may only work in English.
 - b. **Interpretation:** At a minimum, prepare yourselves to contract at least 2 interpreters per language. You may be interested in taking a 'language justice' approach. There are also different forms of interpretation when more than two languages are involved. We recommend simultaneous interpretation.
2. Technical considerations vary based on the format of your event. Our focus here is virtual event planning. However, many of these same suggestions may apply in principle to in person formats.
 - a. **DO:**
 - i. Ask preferred language when registering attendees
 - ii. Translate written communications both internally among organizers and externally between organizers and attendees/presenters.
 - iii. Prepare instructions for attendees and speakers in each language of the event, including anything related to navigating the chosen platform, especially if these platforms are monolingual.

- iv. Prepare presenters to convey information in a multilingual context that involves simultaneous interpretation. Most people naturally speak much faster than can be interpreted. Best practices should be adapted and shared with any speakers.

b. DON'T:

- i. Attempt to translate all communication between participants. This is both time consuming and potentially quite expensive if relying on translators. Consider creating language specific channels and directing attendees and participants to resources (e.g. **DeepL, Google Translate**).
- ii. Assume participants are familiar with multilingual environments. Prepare them accordingly, especially speakers.

SIMULTANEOUS INTERPRETATION



Definitions

With relay there is a “central” language. In the example above that is Spanish (ES). This means if a speaker is presenting in French (FR) and an audience is listening in English (EN), the ES-FR interpreter translates the speaker’s words into ES first, and then the EN-ES interpreter listens and translates that interpretation for the English speaking audience, hence the “relay.”

With direct interpretation there is no relay. There is an interpreter for each possible language combination. This means you need even more interpreters. There must be a pair of FR-ES interpreters, a pair of ES-EN interpreters, and a pair of EN-FR interpreters. The needed combinations increases with the number of languages spoken by attendees/presenters.

BEFORE THE EVENT: PREPARING PRESENTERS

We recommend preparing a document with guidelines for presenters and having it translated into all event languages to be shared when they are invited to speak or notified of their presentation being accepted. These guidelines can be tailored to your specific event, but should generally follow these principles.

1. You will need to speak more slowly than you usually do. This is to ensure that audience members can understand, but more importantly so that captionists and interpreters can keep up with you as they transcribe and translate what you say for attendees whose preferred language is not the language you will be speaking.

Tip: English speakers tend to speak fast and contract words (e.g., don't, it's, s'okay, etc.). Spanish and French tend to require more words to communicate the same things as English because of prepositions and articles. It may also take longer to translate into other languages via simultaneous interpretation. Sign language generally conveys the meaning of whole sentences, so translation may only begin after entire sentences are completed.

2. You only have your allotted time in which to present. Strict time will be kept to be sure that all attendees can take breaks between sessions. This is both a matter of respect and accessibility. Breaks in between sessions are something everyone can benefit from and necessitates that you, as a presenter, use only your allocated time.

Tip for speakers: To prepare you can pre-record a talk on YouTube and then watch it back at 75% speed to be certain it fits within the allotted time. Pre-recorded presentations will likely be played at this speed to make the interpreters' and captioners' task more manageable.

3. Prepare a back channel for communication during sessions (e.g. notifying when time is almost up or to speak more slowly to enable interpreters).

Tip: Virtual presentations may be more cumbersome, but can be accommodated with things like cue cards on cameras or adjusting settings for internal/private communications in your teleconference software of choice. Interpreters will also inform you of hand signals they may use to communicate with speakers even as they continue to translate. These will be shared in the back channel at every new session.

4. Offer instructions for attendees and presenters at the beginning of every session that include reminders for how to operate in multilingual spaces as you strive for accessibility for all.
5. All written materials (e.g. slides) from presenters should be sent in advance so translators and interpreters can familiarize themselves with technical terms and acronyms.

BEFORE THE EVENT: OTHER CONSIDERATIONS

We strongly suggest holding a single schedule with no concurrent sessions. Holding multiple sessions simultaneously will affect attendance and can even create a sense of segregation based on geographic regions featured or languages spoken in a session.

We recommend purposefully diversifying sessions both when taking external submissions and curating panels of speakers. This may include highlighting particular regions or groups of people, such as all participants from Southwest Asia and North Africa or all Anglophone Central Africans. Make sure to diversify the speakers in sessions to encourage transnational and global learning together, decenter the Global North, and highlight the importance of geopolitical contexts and different lived experiences.

We recommend creating a primer for attendees in advance that can include a glossary of common words in multiple languages (especially if it is a scientific conference or may feature lots of jargon) and an explanation of relevant geopolitical contexts. This will enable everyone to participate more fully and save speakers or presenters from having to spend more time giving context than presenting their ideas. Creating a committee specifically for this purpose will help you to better synthesize contexts, terminology and acronyms from different geo/political contexts.

Consider providing informal spaces for dialogue among attendees. Spaces like ‘virtual cafes’ and artistic/entertainment events where the interaction is more informal can help people to learn and share in a less scheduled environment.

BEFORE THE EVENT: REGISTRATION

Try to build a budget that does not rely on paid registrations. This will help you to rely on concrete funds rather than speculating about attendance.

If you do require a registration fee, we strongly recommend offering full scholarships or at the very least a sliding scale to account for economic disparities between different countries.

You can also ask registrants from higher income countries or institutions (e.g. philanthropic organizations, corporations) to donate costs toward registration fees or sponsor those from lower-income ones.

The registration fee can also be a deterrent for those who may 'Zoom bomb' or 'troll' your event, especially if you are addressing a social justice topic or uplifting a marginalized community.

Registration is also a fantastic time to recruit volunteers.



BEFORE THE EVENT: TIPS

Difficulties finding translators/interpreters

- Remember this is a highly specialized skill, even more so when looking for interpreters who are familiar with the kind of language needs you have (e.g. gender inclusive or trans-affirming, academic discipline specific, scientific or other technical language).
- Don't underestimate how long this may take and know that you may need to contact multiple potential contractors.
- Paying interpreters (and other contractors) across borders can be a great way to decentralize the Global North, but may also pose problems with transferring money across countries or continents. Prepare for this and potential delays. Also make sure to add any fees for wire transfers or other costs to the amount you pay.

Self care

- The event or program will not be successful if you as organizers do not prioritize your own health and well-being. If you're passionate about the topic or communities affected by the work you're doing, it can be easy to overdo it because you care.
- Cultivate a culture of interdependence among the organizers. This means you can rely on one another to take care of yourselves as individuals, but also to take care of the collective by stepping up when help is needed, falling back when you need rest, and mutually committing not only to the event, but to one another's well-being.

Be humble

- You will receive feedback and some of it will be negative. Have a plan to address it so that everyone can participate meaningfully. Don't take it personally.
- There will be times where things have to change with almost no notice. Accept that flexibility will need to be part of your approach early on so that you aren't caught off guard.

Don't overcommit or promise too much

- A tried and true way to make sure things go awry is to promise things you don't intend to, or cannot, follow through on.
- Don't be a hero! The event will move forward whether or not you personally go the extra mile every time.
- Don't lie or embellish to appease people. If someone asks for something that you are unable to provide, do not commit to it. Be honest about limitations, be they budgetary constraints, limited person-hours, or anything else. People will make their own informed choices. Remember that you can only ever reduce risk, not erase it.

BEFORE THE EVENT: VOLUNTEERS

Get organized. You need to track who is volunteering for what and when. Even something as simple as a Google spreadsheet can help a lot.

Make sure the volunteer team is as multilingual as the organizing team. It helps to have point people for each language being used. A technical expert or moderator in each language would also be ideal.

Be clear about your expectations from volunteers and encourage them to be realistic about their availability and capacity. We recommend asking for explicit time estimates (e.g. total of 5-10 hours, 4 hrs/month, 2 hrs/week).

Consider holding an orientation session to help volunteers understand what they will be doing and to ensure that they represent the event values, understand challenges they might face and how to navigate them.

If you receive unsolicited offers for volunteering, which is quite likely if you have a community-oriented or community-led event, make sure to acknowledge them in a timely manner. It can be disheartening not to hear back when you are making yourself available for free. Respect their commitments and be sure that someone follows up with them and plugs them into the volunteer infrastructure you've built.

BEFORE THE EVENT: LAST REMINDERS

Do some trial runs of the technology needed to make your event run, especially if the event is virtual. Try a mock panel and make sure people doing the technical support work are aware of any issues with the mechanics of running your event. Include drop-in sessions for all presenters and attendees to trial the technology and to meet co-presenters and facilitators for their sessions in advance.

Check in with everyone who is helping with the event and make sure their needs are met and any little fires have been put out.

Send reminders to presenters about the presentation guidelines and to the attendees about your code of conduct and expectations.

Send presenters guidance on how to format their slides to ensure accessibility (e.g. no text at the bottom where captions may overlay, large fonts, and good color contrast).

Send thank you notes to everyone involved so they know they are appreciated even before the event begins.

We recommend conducting a post-event survey to solicit feedback on participants' and presenters' experiences and recommendations. You will want to design and workshop this survey well in advance of your event. Consider also making this survey available on the last day of the conference.

DURING THE EVENT

Security, Safety and Privacy

Unfortunately, your event might be purposefully disrupted by people who do not align with its purpose or values, including being targeted by hate groups. You should be prepared to minimize damage.

- Some video conferencing applications, such as Zoom, provide important security features. For example, a waiting room allows you to grant or deny entrance, and you can mute or kick out disruptive attendees. This software can be expensive, but someone in your team might have access through their institution.
- Ask your presenters in advance if they accept being showcased on social media before or during the event (e.g., if they're okay with live-tweeting). Let attendees know about these preferences during each session.
- Instituting a registration fee may help to dissuade purposefully disruptive individuals.

Internal Communication

- By the time the event has begun, you will be intimately aware of the communication issues you face most frequently amongst yourselves as organizers.
- Create and maintain a channel of communication among organizers, volunteers, tech support, and any contractors (e.g. interpreters) in case any issues arise.
- We strongly recommend having a backchannel that is just for direct communication to speakers or presenters.

Tips

- Be prepared for things to go wrong and handle them as quickly and as calmly as you can.
- Remember that participants and attendees might have unrealistic expectations about how smoothly things should run or how much or little work it is to run an event like yours. Don't take it to heart.

DEBRIEFING: RECOMMENDATIONS FOR FOLLOW-UP

Conduct a post-event survey to solicit feedback on participants' and presenters' experiences and recommendations.

We recommend designing the survey and having it workshopped by people with survey design experience well in advance of the event.

Some platforms for virtual events will also do this for you and create reports on your behalf or even offer you the raw data.

If you record sessions, getting these cleaned, rendered, and uploaded will take time, but do try to make it happen as quickly as possible.

Consider as well how long you'd like participants to have access to them, or if you want some (or all) sessions available permanently.

Whatever your choice, you must obtain appropriate permissions from all presenters. It is best practice to reconfirm this just before uploading.

SOFTWARE AND PLATFORMS WE RECOMMEND

We highly recommend **Whova** for the price and their support team (they often offer deep discounts for educational institutions), though with the caveat that it is a monolingual platform. Accordingly, you should provide instructions on navigating it in multiple languages and a tutorial on how users can setup a Google Translate extension in their browsers.

We used **Basecamp**, **Facebook Messenger**, and **WhatsApp** for communication. Facebook Messenger and WhatsApp are free for all users and Basecamp is free for students. **Signal** can be used for a more secure messaging option. You might also be able to use a friend's paid account. Note that not all platforms are allowed in all countries and it may be necessary to establish workarounds with, for instance, VPNs or use multiple services (e.g. **WeChat** in China, or **VK** in Russia).

Security can also be a concern here. Zoom, for example, routes most if not all information through the US and stores data on their servers, which they may access or hand over to law enforcement. The security concerns regarding Facebook Messenger are similar. While we don't have experience with it specifically, the website [Privacytools.io](https://www.privacytools.io) lists several security conscious options for internet tools.

There may be constraints based on sponsors, funders, or the organizations involved (e.g. universities working with Zoom, government agencies in US contracting with Microsoft Teams). The upside of this is that the organization will usually provide these services for free or at a discount if they are required.

For software specifically, and whatever choices you make, some kind of single source of truth needs to be established. This would be a space or document that holds all relevant information in a way that avoids duplication (e.g. one document gets updated while the other doesn't). This can be something like Notion or Asana or even a very well organized Google Document and Drive. This can, however, get messy really quickly and will need constant curation and pruning.



