4 The lead up and going live

1. How, when and where to share my event:
Communications plan, invitation and registration form design, and outputs
2. Core principles for a safer and more accessible event
3. Technical support during my event, backup plan and preventive measures
4. (Re)imagining facilitation for online events

- Outreach
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    - The responsibility and artistry of facilitating intersectional and inclusive conversations
    - Mindfully engaging the body in online events

Outreach

Let’s start with privacy and security concerns. We have stressed the importance of privacy and security concerns at the different stages of your event. Privacy is key when sharing the event invitation. Keep in mind that:

• You might need consent before contacting potential participants (for example, European General Data Protection Regulation, other relevant privacy laws.)
• Receiving an invitation to an event can contribute to put a person being put on the spot in certain repressive contexts. Check you risk assessment for levels of risk your event may pose for different participants.
• Use encryption in those cases where your invitation may pose risks for your potential participants.
• Allow participants to register and participate using an alias, if possible.

Outreach

Communications plan for your event

Start with a plan. Preparing in advance is key. A communications / cover plan for your event will help you decide the information that should be published and prepare the messaging accordingly. Here are the elements we include in our event communications plan:

- **Goal:** What do you want to achieve through this event?
- **Intended audience(s):** Who are you addressing, aiming to reach?
- **Timeline:** A clear timeline of activities will include the different tasks and who is responsible for each of them.
- **Spaces / platforms**
- **Messaging:** What are the key ideas, highlights that you want to convey to your audience(s)?
- **Indicators:** How will we measure the levels of success of the event?

What does messaging entail?

There is a difference between information and messages. Messages are what you want to convey with the information you give, what you want people to remember or think about. Therefore, your messages will determine the communications tools you choose.

Work on a set of messages in advance, but also leave room for improvisation and for adjusting your content to different formats, spaces and audiences.

Be careful with scheduling messages, as the context may have differed once these messages get sent. This is especially important in the current climate, with events changing rapidly, so if you preschedule social media post make sure to regularly monitor them and delete them if context changes. There is also a risk of the tweets appearing less personal, so if prescheduling social media posts make sure to regularly check how people are interacting with those posts.

When should you start sharing and where?

Share early (2-3 weeks before), not so early (1 week before), and right before the event (day countdown). This is generally a good sharing pattern for social media but avoid replicating it via email, which can be overwhelming and have the opposite effect. Share a final schedule with times, so potential participants can plan accordingly. And try to share at different times, keeping in mind different time zones.

In terms of channels, try different channels to reach different audiences:

- Email (don’t abuse it, as most people have a full inbox)
- Different social media platforms (Facebook, Twitter, Instagram, TikTok, specialised fora, messaging apps...) Choose the ones where you think your audience for this particular event may be, based on demographics, age patterns and online habits. Creating one (or more) hashtag(s) for your event will help you track the conversation around it.
- Press release (journalists tend to pay more attention to press releases, as they are tailored to them).
- When it comes to community based events, some people are strategic in their use of online spaces and might miss out the information on your event that they would otherwise be interested in attending.

Outreach

How to design your online event invitation

- Make your invitation short and visual. Include the visual identity of your organisation / event + title of the event + date + speaker + hashtag + any other relevant info. Add a link for further context and make sure there is an easy way to contact you for questions or suggestions. Describe the link target.
- Be honest about what you offer. Focus on your content and why it may be relevant or useful, invite people in an honest, not click-baity way.
- Avoid generic and spammy-sounding invitations such as “Are you going to miss this?” that will make you sound unoriginal and needy.
- Be mindful of language. Use simple language that welcomes people with different identities, gender expressions and diverse lived experiences.
- Make sure your invitation is available in higher resolution and size for persons who have vision of focus difficulties. Contrast letters, images and background. Use bold and bigger font types where appropriate.

Example: “APC invitations for Challenge lecture series”

https://www.apc.org/sites/default/files/styles/node_full-size/public/Hate_II.png?itok=a3LJKgeP



Outreach

Things to consider (not) including in your registration form

Registration is the equivalent of the name tag of an in-person meeting. It serves as a safety practice to know who is coming and who is in the “room” - it sets the tone for your policies and practices of making the environment safer. Registration can also reflect your practice of welcoming all your participants. It helps people to look for each other, meet and share. It helps in preparing plenaries and sessions to ensure the preparation team has the capacity to provide support when tech fails.

In terms of APC practice, the details provided by persons as part of the registration are used only for the purpose of the event and are deleted within 2 weeks after the event, as you can find here in our Participant registration form we used for our Member convening 2020.

Here are some things to consider when drafting registration forms:

- Think about the design and content of your registration form. Is it queer-friendly, diverse needs-friendly and welcoming to your constituency and participants with different lived experiences? We recommend going through How to Make Virtual Conferences Queer-Friendly: A Guide by Queer in AI and Ensuring Virtual Events Are Accessible for All by RespectAbility. Both of these resources also feature practical examples to include in your registration form.
- Rethink with your team which information you need and why. Do you really need your participants’ personal information such as first and last name, date of birth, address, occupation or titles? Make any fields you don’t really need optional. Enable registration for participants using alias, if possible.
- Asses with your organisation if gender is necessary or preferable (and optional) to include in the registration form. Include a short explanation on your choice in the registration form and consider including confidentiality note, anonymisation protocol, as well as who will have access to data and to what purpose.
- Offer optional and multiple choice for pronouns and always include an additional block for people’s own gender self-expression.
- Regardless if the event will be public or closed type, offer multiple options on visibility of pronouns in different spaces of your event.
- Anonymize all data regarding device type, name, address, pronouns, relationship status, gender and region once data is collected.

- Be mindful of readability (contrast, size of letters, explanations of links).
- Enable additional forms of registration via other means, such as by phone. This includes persons with vision difficulties, restricted access to internet and folks who are strategic about their use of online spaces.
- If safety and/or confidentiality is a major concern, inform and remind participants of the risk of sharing open links of the online event on social medias or on large server lists.

Outreach

List of suggested communications outputs for your online event

- Publish an article announcing your event on your website (depending on the strategic relevance of the event)
- Create an online event using your usual social media platform (depending on the strategic relevance of the event)
- Share it on social media and with your networks (think of a powerful hashtag for your event to help promote it effectively).
- Feature it on your newsletter
- Put together a document with messaging for social media (teasers, core ideas, highlights)
- Work on the event’s visual identity: a banner, an infographic, an online invitation.
- Prepare a press release based on your event to share with journalists
- Live tweet / share highlights from the event in real time
- Work on a summary of the event to be published on your website
- Monitor the outreach of your event

Core principles for a safer and more accessible event



- **Safe space:** Privacy, security and anonymity needs of your participants are the baseline for creating a space that holds minimal harm and is enjoyable for all. Define your consent, privacy and confidentiality principles and protocols. The golden rule is to communicate them in advance and ask for consent.
- **Care:** Reflect and practice care in your event duration, accessibility support, safety considerations, session design, self and collective care activities, etc.
- **Principles of participation:** This is the guideline of your event. The values and principles informing your events should be clear, shared, discussed and acknowledged by all participants.
- **Choice of technology:** APC prioritises free/libre and open source software (FLOSS) and open standards, as to remind us that our choices need to be: Driven by community needs, sustainable and secure.
- Think about the content you will be presenting and sharing, the shared labor and commitment of everyone in the space and credit previous projects, contributions, sources, people, etc.
- **Effective facilitation:** Facilitation during your event supports plurality of perspectives and lived experiences, language diversity, and acknowledges the knowledge, unique pace and needs of each and every person in the room. It is the artistry of fostering mutual learning, care and intersectional
- **Tech support, backup plan and preventive measures:** Real time interaction requires prompt action. Have clear steps and protocols with your tech team to address concerns - at any point of the event. Backup all roles and every piece of material relevant for your

event so that you can respond in various circumstances.

- **Ask, adjust and response:** Adjust the content and pace if there are additional needs than the ones first identified during your preparation phase. Make sure to have a reference person to provide accessibility and tech support for those who might need it.

Technical support during your event

When creating an event that runs fully online, the attention that is given to logistics in physical events is now primarily focused on the technical platform. We have learned that for a successful event to happen the session presenters and organisers have to be relaxed in order to take care of the session content. Therefore tech support is needed to take care of everything else related to the platform use.

Running online events is not simple as there as many parameters based on which different circumstances can arise. Here are a series of recommendations based on our experience:

- As shared at the planning and design stages, selecting the technologies that you will be using very carefully is key. Now take into consideration the number of participants, and the location and quality of the connectivity that they have. Consider also the operating systems and devices that will be used by participants.
- Plan all requirements in advance: you cannot improvise in an online event. Have all the needs covered by the technologies (for example, polls and surveys, shared boards, shared documents, music you want to play, links to external resources, presentations).
- Test the technologies before the actual event: run a dress-rehearsal.
  - Conduct platforms tests, particularly audio tests, with all people that will be speaking and presenting.
  - Test with interpreters and captioners.
  - Upload and test presentations and visuals
  - Test music and external links
  - Agree on and test your side / back channel to discuss the preparation and address any issues that may come up during the event.
- Have specific tech support roles assigned during the event:
  - Tech support for translators, interpreters and captioners for checking sound in audio channels or any issues that they might have.
  - Tech support responsible for monitoring who comes into the space, letting them into the waiting room or responds in case of harassment or serious violation of principles of participation.
  - Tech support ready to assist participants that have issues connecting, muting those that inadvertently leave their mic/camera on, focus the “camera” on speakers.
  - Tech support for recording, starting presentations, etc.
- Our practice is also to have backup roles, i.e. additional tech staff ready on stand-by.

If several tech support staff will be working at the same time, have defined roles and responsibilities for each, as well as a clear schedule that shows the tasks that have to be done by each of them at a certain time (start recording, test interpreters, show presentation, play music,

record the event, run polls, etc). That way the tech staff can stay focused and respond to a task.

Backup plan and preventive measures

There are many things that are out of your control during real time online event: connectivity issues, equipment issues, speakers loosing sound, etc. Many times this results with the interruption of the event as to deal with the issue. Make sure you have your tech support team on board with you, hand out materials to all participants and facilitators ahead of the event, and back-up all relevant materials. You also might want to consider pre-recording speaker presentations.



What if...?	Backup plan
...the platform used has major disruptions?	Have an alternative platform ready on standby.
...a speaker or participant temporarily loses image and/or sound?	Make sure to have tech support who can assist the person in a private chat or via phone if the issue persists.
...a participant has bad audio reception due to connectivity or other issues?	Having the facilitator summarise other participants' interventions can help here. This also contributes to making sure that the messages are conveyed clearly. If the bandwidth is the problem, advise using audio only and turning off the video. Tech support can also contact and support the participant with instructions related to audio settings. If a phone dial-in option is available, this can also be offered. Always test before the beginning of the session.

...a key person loses connectivity?	It’s good practice to remind all of the key persons (including your team) to prepare chargers, have mobile internet activated, and send backup presentations to you in advance. It is always useful to have an alternative communication channel with them, e.g. Signal, Wire, Telegram or some other instant messaging service, and even a phone number. If the key person is one of your facilitators, also plan to have the other facilitator/backup role on standby. Always test before the beginning of the session.
...a participant disrupts the event or violates the principles of participation?	Have your tech support on standby for these issues (chat block options, removal from the session, etc.). Always have clear policies and protocols on violation of the principles of participation.
...the material cannot load?	Make sure to run a rehearsal prior to the event. As a second option, and if you can view the material on your local device, you can also share your screen. When it comes to sharing videos, be aware that some participants might not be able to watch due to digital “rights” control, but if you host and run local videos, that would solve the intellectual property control issue.
...the turnout of participants is low?	To prevent this, make sure to send out your invitations in advance. Go back to our section “Outreach: How to share your event”. If it happens on the day of your event, run your session with additional activities ready beforehand.
...the turnout of participants is unexpectedly high?	Consider cutting some of the activities. Another option is to communicate with your participants about the time frame and agree on additional time.

(Re)imagining facilitation for online events

Questions in this section

- Planning facilitation for online events
- What to prepare and share beforehand?
- How to design a session? | Preparation, checklist, templates and examples
- How to manage time effectively?
- Defining consent, privacy and confidentiality protocols
- The responsibility and artistry of facilitating intersectional and inclusive conversations
- How to mindfully engage the body in online events?

Planning facilitation for online events

Holding people and space(s) online can be challenging for many facilitators despite the years of experience already doing it in physical events. There are some similarities, but still many more specificities that cannot be applied in the translation between the two. The space(s), setting, participation and general flow during and after the online event are specific for the digital realm. As part of your preparation for facilitating your online event, the key point to have in mind is how you will co-create and support the experience of being together in the shared space that is digital and real. Imagining that experience has many factors that should be taken into consideration, such as:

- The digital realm is another and distinct dimension of our reality, meaning that we perceive, process, feel, respond and experience it. It does not make us immune to vulnerability, nor does it remove the layers of our fragility. Quite the opposite, structural inequality, discrimination and exclusion are mirrored, present and oftentimes amplified in the digital realm.
- Technology, access and accessibility needs of your participants determine their participation by preventing, obstructing or supporting it.
- Non-verbal language and visual cues are limited. Also, camera sharing depends on your participants' choice or lack of that option, which makes it harder to read and adjust the energy in the shared space.
- The time needed to create connections between participants is limited, which would otherwise be nurtured at on-site, in-person physical events through socialising with one another.
- Social spaces have to be designed, the story around them created, and effort invested in encouraging engagement. Consider sharing songs, (art)work, and other content that can encourage connection.
- Protocols and tactics are needed both from facilitation and tech side as to respond in a timely manner to disrespect, harassment and violence.
- Additional materials have to be prepared in advance, including intructions and manuals for tools that will be used as to facilitate participation for all participants.
- If access is not an issue, online events can also have positive sides from the point of participation: the device can serve as a buffer for people to process new input without the pressure to respond immediately and they can adjust their pace of participation.
- Physical space for on-site events enables participants to feel mentally and physically away from their home(s). During online events, it's important to be creative and use your imagination to build the narrative for your event. This includes the story around the event, the purpose, as well as naming different channels of communication.

Example: Our Member convening in 2020 was to be hosted in Cuetzalan, Mexico. With the pandemic, however, we were only able to meet remotely, from our homes, offices and communities. So in the spirit of looking ahead and reimagining our world, we explored this beautiful Mexican town virtually by naming the meeting spaces inspired by the topology of Cuetzalan.

What to prepare (and share) beforehand?

- Go through the list of your participants and all information they shared through your preparation survey and registration forms. Make your own rationale and adjustments based on the information provided, such as: country, devices, connection speed, accessibility needs, language(s), etc. Reflect on potential risks and accessibility adjustments you will have to make.
- Plan early and have your session design, materials and final schedule ready and share them with your team.
- Make the material accessible. Think about translation, interpretations, closed captioning that will be used. Also think about readability, contrast of image/letters, diverse formats (textual, visual, audio) and use simple language(s). Don’t use flashing images for your presentations.
- Define the final schedule ahead of time to allow for proper planning. At least 3 weeks in advance would be ideal and share it with your team. Make sure the time of the event is set so that it works for participants in regards to their time zone, work, personal life, etc.
- Share the schedule with your participants at least 5-7 days in advance, including the times expressed in various relevant time zone(s), so that they can plan if they want to attend and organize themselves. Minimise changes to the schedule.
- Sending a “Readme” to participants before the event will help ensure the event runs smoothly and participants are aware of all relevant information, tools and technologies that will be used. You can include different materials in your Readme (agenda, list of tools that will be used, instruction manuals, etc.)
- Practice technology in advance with your tech team, create a backup for your role and all relevant documentation
- Consider offering a designated space/channel of communication for support
- Prepare the space, language(s), material and pace to your participants’ access needs.
- Set up a channel for communication with your team where you can communicate on issues relevant to the event while it is happening.
- Think about your tactic on handling power dynamics within the group. Check Power Dynamics and Inclusion in Virtual Meetings.
- Define consent, privacy and confidentiality protocols in advance

How to design and plan your session(s)?

During the last years we have collected templates for interactive remote exercises, icebreakers and energizers, and we have various repositories of others activities and facilitation tips. Here we would like to share with you our example of session(s) design outline, checklist and our template that we are using - hoping these can be helpful.

Session(s) design outline

- Title [Think of the title that unlocks imagination]
- Purpose [What is the session about and where do we intend to land]
- People and Roles [Leads facilitators/host; Care facilitators; Chats and Time moderators; Tech Support]
- Exercises and Materials [Icebreakers, games, role play, creative materials, photos, journals, etc.]
- Preparation [A detailed description with duration and time of each planned activity from opening to closure, who is doing what and when to share with everyone involved, including the documentation team]
- Agenda [A short description of the various sections of the session with time duration, including breaks to be shared with participants]

Session(s) design checklist and preparation template

Title [Think of the title that unlocks imagination, that is creative, inspiring and welcoming]

Purpose [What is the session about and where do we intend to land]. A session is a stepping stone in the overall arc of the meeting. Make sure you have clear the overall arc of the event you are contributing and co-creating. Identify one up to three goals your session aim to address. The Purpose has two kinds of statements: 1) What do we want to achieve? and 2) Where do we hope to land? You can develop a tailored specific purpose for your session.

People and Roles – Online facilitation is characterized by fragmentation of spaces which asks for dedicated people to look after so that participants can experience the spaces with easiness. Define your team and agree on back channels or ways to address and respond to glitches or provide support to participants.

Based on our experience we have identified the roles below. They can be played by different people or some of them can play multiple roles. We always make sure our team feels comfortable with playing more roles. Wider facilitation team is made of:

- Leads facilitators/host – They lead the session design; take care of the opening and closing, hold the overall flow of the session, explain exercises and introduce people and their roles and the documentation team.
- Care facilitators – They lead on designing care into the session, help with body breaks, mindful and fun moments
- Chats and Time moderators – They follow the conversation in the chats and or any other agreed spaces, bring input back to the conversation, are responsible for time management and help leads facilitators/host and participants to be mindful about the time.
- Tech Support – This team is usually made of three persons. Their role is to explain and share any relevant information on the tools/platform used, support team and participants to overcome tech glitches, and respond to any issues that might arise.
- Documentation, translation and interpretation team - They are in charge of looking afters notes, decisions and key highlights of the conversation, translation, interpretation, and are included in the back-channel of communication, if one is created.
- Logistics and scheduling - Their role is to ensure everyone in the full team knows where they need to be, at what time, and who they need to connect with.

Exercises and Materials - These are activities that unfold the arc of your session and that support achieving the purpose. They can be various and inspired by different methodologies. The most used ones are icebreakers, energizers, brainstorming, role-play, facilitated discussions, etc. Activities can be done all together in plenary, in small groups or individually.

Preparation – This is the detailed description of each item on the agenda. It indicates the duration of each item, who is doing what, which materials will be used (from crayons and papers for drawing, doing collages, to links and specific online tools that will be used and tech support that might be necessary. We hope our template below will support you in your preparation as part of the checklist. The preparation is shared whenever is possible with the documentation team.

Agenda – The agenda is a short description of the various items that are part of the session. It includes time duration of each item, breaks. An item can include more than one activity, there is not a fixed amount of items that compose an agenda. It can be shared with participants before the session or at its opening. An agenda usually includes: title of the activity, duration, and additionally you can add the name of who is leading different activities.

Preparation template

Time	Activity	Exercise/methodology	Duration	Who	Materials
	Opening				
	Activity 1				
	Activity 2				
	Break				
	Activity ...				

	Closing				

APC examples from practice: Welcoming, opening and closing

Welcome your participants: Share the tips for attending the session

- Ask your participants to write their names/alias and pronouns on the platform used. Remind them that this is optional for those who do not feel comfortable disclosing their pronouns.
- Video is optional at any point of the event. If used, remind your participants to turn off their cameras during breaks.
- Remind your participants to mute when they are not talking. Remind them to cancel the background noise when talking.
- Suggest to sit comfortably and have a glass of water, coffee or tea next to them.
- Explain that if they want to talk, to type HAND in chat, or raise HAND emoji if the option is available. Sometimes when there are many participants, the option to raise their hand on video is not the best option.
- Encourage the use of chat with symbols for C-comment, Q-question, HAND-talking, “+” for agree, “-“ disagree, CL-clarification. Come up with your own symbols, but keep it simple. Encourage the use of sharing drawings or any other form your participants feel comfortable using.
- Invite people to focused presence as best to their situational capacities. Minimize multitasking. Remind to close other applications or tabs in the browser.
- Offer a shared document for questions, comments and reflections.

Opening. Set the framework of your session: guidelines, narrative, tone and grounding

- Introduce yourself and all of the teams present. Introduce your participants to the space, technology, communication channels used and offer accessibility and tech support.
- Share the agenda with your participants. Make sure to set the tone, narrative and inform participants of what will happen, breaks to rest, activities and your objectives.
- Share the principles of participation and make sure the group has access to them and agrees on them. Ask people how they connect to lived realities and welcome adding points they find meaningful.
- Share consent, privacy and confidentiality protocols and agreements.
- Suggestion: Grounding activity. Have an activity that will help participants settle into the space and be open for connection. You can invite your participants to bring their favorite object and share the story behind it. Or you might want to do a breathing exercise to settle into the space.

Closing and celebration

Invite your participants to share impressions and what they are leaving with. This can be useful for your reflection and evaluation process. Closing is also important and remind what are the main agreements or follow up steps if any. Dedicate some time to play music, sing, read poetry and celebrate the collective energy that was shared. There was a lot of hard work done, a lot of time and dedication invested for knowledge and insights exchange. Make sure you celebrate the powerful connection that was established - and these are just some of the reasons for joy!

Consent, privacy and confidentiality

Announcing consent, privacy and confidentiality protocols and any form of documentation, provides participants with a choice and also a reminder of the nature of the event. The golden rule is to communicate in advance and always ask for consent.

The considerations below matter regardless if the event is labeled as public or closed for a limited number of participants.

- To create safe and confidential spaces based on the idea that “what is said here, stays here”. They involve intimate, personal exchanges, with recording only during certain exercises, which will be announced to participants. Recording will be switched off as well as on upon request.
- **Direct quotes and images.** Use of direct quotes for social media accounts as well as sharing of images require always expressed consent and giving attribution.
- Screenshots also require expressed consent or have to be announced so that people can turn off their video if they do not want to go on record. Remember also to edit names from the image to comply with the requested confidentiality and privacy. More in general ask yourself, do you really need the screenshot? Are there other simple way to build memories of good moments?
- **Chat and comments.** Announce in advance if chat logs and comments will be saved. Communicate the protocol, such as anonymisation of content (name, pronoun, profile picture, etc.).
- **Camera on/off.** Mind that you may have an awkward moment if you ask people to stand for their stretching with their camera on. Some prefer to be in more comfortable apparel while sitting in front of their computer. We recommend that you always provide participants to choose to opt in and out from every activity that you propose. Remind your participants to turn off their cameras during breaks.
- **Mic on/off.** Remind people to turn off their microphones when not speaking and during breaks. Also, offer options for participants who can’t or do not want to speak over the mic e.g. noisy background, sore throat, feeling uncomfortable etc. to voice out in the chat area.

If any materials will be used, agree on and sign the protocol for consent, safety and attribution:

- Explicit consent:
  - what [material] will be used for [public] purpose and where [link and description]
  - do they give their consent to [your organisation]:

    - yes
    - no [if no, do they give consent for participants-only space use]
- Safety: is there a concern for their safety related to the content they shared
    - if yes, are they in agreement that you redact names and specific location before publishing the story
- Attribution: how would they like the attribution of the story to look like:
    - their name (and last name)
    - their preferred name
    - only initials
    - their name and the name of their organization/collective
    - only the name of their organization/collective

What about people’s contacts?

Gathering contacts does not have to be a challenge on online events and you can use this as an opportunity to engage with new people. Make sure you either have a registration form or a link where people can share their information if they want to know more about your work, subscribe to your newsletter, etc.

If your participants give their consent for internal sharing of their information (such as name, email, social networks links, links to websites, etc.) you might want to consider making a book of participants and include that information. You can prepare and design this in advance and share it will all participants. Based on our experience of our Member meeting in 2020, this can facilitate connection between people and socialising, especially if you will be also having designated channels of communication or dedicated space(s) for informal interaction.

Effective time management during your event

Time is a very valuable resource in every event, but it is particularly so in online events, when attention poses more challenges and it can be easily drawn elsewhere. A good facilitation / moderation process is key to ensure that each speaker sticks to the time frame, that questions or issues by participants are addressed in a timely manner and that the conversation is dynamic, participatory and easily followed.

Facilitators should always give more time than they think is needed for activities and exercises, taking into account the time it takes to mute/unmute, move to breakout rooms, tech problems, languages diversity, etc. Make sure everyone involved in the event assigns time for it like they would for an offline event (no interruptions, no other tasks at the same time). Also, you should remind your participants which sessions are optional.

Be aware that “online” means that people will be sitting in front of a screen. One hour and a half may be ideal for some online meetings, but absolute rules can’t be made on this, as capacity to be engaged differs from one person to another. We all have different pace of participation which depends on our technology and digital literacy, language, accessibility, internet connectivity, public speaking skills, etc. Consider adjusting the pace of your session to your participants’ needs and contexts. This is especially relevant if the language(s) used during the event are not shared by all participants.

Be mindful and allocate time for all participants. Gently remind and offer different spaces and ways of participation for those who haven’t shared anything yet and be respectful of their participation pace. Create a list when there are more participants raising their hand. Consider having a shared document for additional questions and reflections. This can be particularly useful if the discussion gets heated and there are important issues being raised while approaching the end of the session.

The responsibility and artistry of facilitating intersectional and inclusive conversations

> “Intersectionality is a way of understanding and analyzing complexity in the world, in people, and in human experiences. The events and conditions of social and political life and the self can seldom be understood as shaped by one factor. They are shaped by many factors in diverse and mutually influencing ways. When it comes to social inequality, people’s lives and the organization of power in a given society are better understood as being shaped not by a single axis of social division, be it race or gender or class, but by many axes that work together and influence each other. Intersectionality as an analytic tool gives people better access to the complexity of the world and of themselves. (Collins & Bilge, 2016, pg. 2).”

Throughout the years of our work, we’ve come to see facilitation spaces as caring containers where every expression of self is encouraged to the extent and pace of every person. Group participation which is framed by feminist principles is contained and held, while safety and care are firmly maintained and balanced throughout the interaction and conversations. We are also responsible for making the space welcoming, accessible and meaningful to all participants.

Bear in mind that the points we are sharing here are not finite, as we have been reflecting and working for the past period on developing our guidelines on facilitation that are based in our values and experience. The points and content shared here are drawn from our lessons of facilitating our online events and convenings and are drawn from our notes, modules, templates, reflections, and our bucket reading list as a source of inspiration. Building this work remains a collective work-in-progress for us.

Your position as a facilitator

There is a high level of responsibility and power that come hand in hand with being a facilitator. Your position is never neutral. The main part of your role is being responsible for keeping the conversation participatory, dynamic, inclusive, balanced and safe at all times - while being aware of power dynamics within the group. This is not an easy task, as obviously, you will not be able to perceive all parameters on the spectrum of privileges and disadvantages for each and every one of your participants within the group.

However, you will be facilitating the group process by bearing in mind that the levels on the spectrum of privilege and oppression are different for each and every one of the participants, including yourself. Your baseline for this process is primarily to safeguard the space with all the power and the responsibility you have as a facilitator. That means that your intervention serves to maintain the boundaries that protect people's sense of autonomy, self-expression and integrity at any point of the conversation.

Your position as a facilitator is by no means devoid of your own lived experience. Self-reflect beforehand and think about your multiple identities, advantages and disadvantages that come with them, your overall background, as well as your limitations or weak spots. If you've never facilitated a session and this will be your first one, it's always good to be honest if you assess that the content shared will not be too demanding or if you feel you have the support of your fellow co-facilitator. All these points might have to be transparently addressed and acknowledged throughout the process. This is an important segment and depending on how you handle it - it can obstruct or support your facilitation process.

From our experience, it's best to have two facilitators as your dynamic of exchange can be supportive and encouraging to those who participate less. It also contributes to more equal workload distribution, meaning that one person doesn't have to carry the entire weight on their shoulders. Having one facilitator in general creates an impression of a "central guide", "a leader" and can feel intimidating for some people.

Finally, try to release yourself and your group of perfection. Be willing to make mistakes, take responsibility for them and don't hesitate to correct them throughout the process.

Facilitating inclusive and intersectional conversations

Let people know you "see" them and manage energy. Have regular check-ins about the level of energy in the room, how people are feeling. **Be mindful that some content can provoke feelings of anxiety, guilt, aggression, sadness and/or remind of past/current trauma.**

- **Be prepared for emotional and political labor.** There is a whole spectrum of emotions, responses and resistances that will arise when talking about social justice in the context of addressing and unpacking privilege(s), disadvantages, oppression, and many terms that translate to people's (and your own) lived experiences. You will be responsible for holding and supporting the group, and at times, to challenge and dislocate some of the individual positions, beliefs, stereotypes.
- **Honor people's emotional state in their current context.** Be aware that the capacities of investment and participation are also situational, meaning that they vary depending on what is happening in one person's life.
- **Welcome self-reflection throughout the session, and/or allocate time for self-reflection and open sharing.** Invite people to reflect on their positions, what resonates with the content shared and what is challenging. People can also do this as an exercise in groups of two or more, or do an individual writing, drawing or any creative exercise**.** This can facilitate the learning process about themselves and within the group, and foster

empathy.

- **Support different pace of participation.** This especially applies if language used is not the native language for all participants. Be mindful that some people might need even more time to express and participate in real time or have different accessibility needs, trouble with focus, vision, hearing, situational capacities, neurodivergent needs, etc. Speak slowly (also if you have interpretation during your event) being mindful that people need time to process new information. Never push for participation and contribution. Respect the pace of your participants.
- **Encourage various ways of participation and reflection.** Invite people to participate by using comments or symbols over chat, or share a drawing or even a song as a reflection are some of the ideas.
- **Use trigger warnings** when issues or content around violence and different discrimination forms will be presented or discussed. Trigger warnings allow your participants to prepare for discussing the topic, decide on participation or support them in managing their reaction and response. Remind other participants to also announce trigger warnings beforehand if they will share content around violence.
- **Support every participant** who reacts, says that they feel triggered by an ongoing discussion, or they are struggling. Acknowledge their feeling, be compassionate and provide holding and support.

Language is a tool of reinforcing power. Use inclusive language and examples supportive of people of diverse identities, gender expressions, bodies, experiences, etc.

- **Use inclusive and supportive language when talking about diverse identities.** Think about the terms and concepts twice. Use nouns that are gender adjusted and gender inclusive when discussing particular topics. Be aware of your use of metaphors, acknowledging that some of them are rooted in war, ableism, racism and sexism. Check out our resources and reading bucket list below.
- **Be mindful of pronouns** your participants wrote next to their names. Name the importance of using correct given/written pronouns when interacting in the shared space. If you notice misgendering, gently remind everyone to pay attention to using correct pronouns.
- **Use diverse and inclusive examples, images and content** that will not reinforce the cisgender, heteronormative, ableist, racist and sexist standards of family, relationships, body, work roles, gender, age, etc.
- **Remind all speakers to speak slowly** as this gives additional time to your interpretation team and especially to your participants to be fully present and engage. If the session is held in non-native language, some of the participants might be struggling or they might need more time to process information.
- When using humor and jokes, be it in illustrations, text or spoken word, do it gently, considerately and most of the times - at your own expense. **Recognise that jokes reinforce many of the stereotypes that support the oppressive systems within our lived realities** and that they should not be tossed around the space as they already do real harm on a daily basis.

- **Use simple language and avoid acronyms.** I there really is an essential need to use acronyms - explain the term you are using or share a note with all of your participants so that you are all on the same page. If some of the participants are using acronyms or some special terms, remind them to explain or elaborate.

Read through our FTX module Intersectionality that emphasises using a both/and framing instead of either/or, that you can use for your guide in facilitating difficult conversations:

- It is important that we use our intersectional analysis not to place blame or guilt on each other to the point that conversations become defensive or impossible, but to **make visible both individual privileges and discrimination as well as systems of privilege and discrimination**.[1]
- **One of the practices that intersectionality brings is about interaction, about using a both/and framing instead of either/or.** It is not about establishing if sexuality or gender matter more than caste or race, it is about looking at their relationship, at where they intersect, augment and reinforce discrimination and/or privilege. Exploring, questioning and making visible the simultaneous, dynamic intersection of one's positionality works for social, cultural and economic context, as well as for understanding power.
  - Privileges and how those privileges can be used to help bring about a more socially, politically, economically and technologically just society.
  - Disadvantages and how those disadvantages are reinforced both structurally and systemically.[2]
- **Encourage people to recognise when to step back and listen by de-centering their individual positions.** This is especially relevant when you have a diverse group of people where some of them face multiple discrimination on a daily basis.
- **Track participation and distribute time with a sense of justice.** Allocate time to all participants, and do it with a sense of justice, welcoming different ways of participation. Some participants might engage more or less, depending on their level of language/speaking/digital literacy skills and some other parameters based on their privilege(s) and disadvantages.
- **As to prevent several participants taking over the space and time**, and to allocate time for everyone, remind your participants to share one or two points when participating.

  Read Power Dynamics and Inclusion in Virtual Meetings on some of the ways people hold power and privilege in online events and practices how to handle the process.
- **Steer gently and in the spirit of mutual learning and honoring the stories shared.** Remind of your objectives and purpose, reflect on work flow and celebrate accomplishments made.
- **Acknowledge that everyone brings knowledges (yes, in plural) to the table**. Remember that people are experts of their life and extend gratitude for the stories they share. Don't validate people's lived experiences, and show compassion and appreciation for the trust you've all been given. Respond if minimisation arises by any of the participants.

- **Facilitate from a space of compassion to self and to others.** The more personal and attuned you can get - you can also encourage other people to connect or reach out. That means to dilute competitiveness and shame as to bring out the unique gifts each person has and wants to share.
- Attempt to create an environment where participants can step in and take responsibility.
- **Have clear team and tech protocols for serious violation of principles of participation, including disrespect, discrimination, harassment.** Be ready to name and handle the dynamics of aggression and also know when it's time to remove the person. Have your tech team on stand-by for serious violation of participation principles.
- **Respond to participants who are engaging in discussions in problematic ways** - making someone feel unsafe, or subtly not being cooperative and collaborative, or taking over the space by inserting their knowledge and opinions continuously throughout the session. Redirect and distribute energy. Remind of participation guidelines, session goals and objectives.
- **Understand online silence.** There is a real need to invest additional effort to facilitate online engagement and this can sometimes put (un)necessary burden on facilitator's shoulders to continuously provide content and keep people engaged. It's easier and faster to feel the energy of people during physical events when people are sharing the physical space. Understanding the dynamics of the group is supported by abundance of visual cues, and silence is more easily felt as part of the process. However, be aware that people use silence online just as they would during the physical event. It is a form of situational reaction when people process new information, reflect on what was being said or simply think about their own position or experiences. Practice honoring the silence and try not to rush or intervene in advance.

Footnotes

[1] APC. Intersectionality | FTX Platform. FTX Platform. https://en.ftx.apc.org/books/intersectionality

[2] APC. Intersectionality and Sexuality | FTX Platform. FTX Platform. https://en.ftx.apc.org/books/intersectionality/page/intersectionality-and-sexuality

Mindfully engaging the body in online events

How can we be both in our bodies and in the space during an online event? This question was raised during “How did you transform your physical event into a digital event?” workshop held at our Closer than Ever 2020 Member convening. Though the workshop focused on online events that were designed to compensate for the restriction of physical events, it also brought up a discussion on engagement in the digital space. Here are some of the tips and considerations for mindfully engaging the body during your event that might be useful:

- Using video: not every meeting needs video, but if you can use it - it offers a moment for people to come together, to see each other and be seen.
- We can also use photos: why do we need to see one another in real time? Taking photos of ourselves, sharing them with our colleagues and talking about the photos offers another way of seeing each other as something we build together.
- Going back to the physical: using art, journals, paper, colourful pencils, and finding ways to integrate them into the digital space, so that our bodies are not only what exists inside the frame of our cameras.
- Design your care and break sessions in the sense that they are also dynamic, besides being reflective. Think about yoga, stretching, group exercise sessions that are adjusted to diverse participants, etc. You might consider including simple video tutorials on neck/shoulder exercises during breaks or as standalone care sessions. It’s always useful to send a link, if the break session is meant to mean “going away” from the device.
- When announcing body exercises or guided meditations that involve connection with body, describe what the exercise will be about, ask if there are different health concerns and adjust. Remind participants that the session is optional. Be mindful that oftentimes bodies are not our temples, as they are also a source of physical and psychological trauma and difficulties, survived violence, gender dysphoria or body dysmorphia. Be gentle and compassionate when announcing the exercises and attentive when facilitating body sessions.
- Use music and some beautiful videos of scenery on your shared screen before the event opens, during the breaks or when wrapping up. Invite people to dance (and sing) however they want: off or on camera!