Inclusive Practices When Developing, Implementing, and Reviewing Trainings and Events – A Guide

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Thank you to all for your valuable contributions!

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Statement

The following guidelines have been developed primarily to achieve compliance with Title II of the Americans with Disabilities Act (Title II) and the City's disability equity goals. The guide also addresses accessibility for people with limited English proficiency who require content to be translated into additional languages as covered by Title VI of the Civil Rights Act of 1964 (Title VI). Since this guide is intended to be a living document with regular updates, it is the hope of those of us who have developed and are promoting this guide that more extensive information related to compliance with Title VI and the City's racial equity goals will be incorporated into this guide in future revisions. We cannot make that happen without you. If you are interested in helping ensure future revisions of this guide include tips designed to make City events more accessible to and inclusive of all people, please contact us. Our contact information is listed after the Table of Contents.

Following the minimum expectations will ensure a basic level of compliance, but will not guarantee your events will be accessible to and inclusive of everyone. The resources provided throughout this guide will assist you in going beyond the minimum expectations.

By centering accessibility and equity, everyone can learn what to include in the City of Portland's ("City" from here on) bureau trainings, public events, and internal City meetings. Additionally, a consistent standard will provide the public and City employees with clear guidance when requesting accessible formats that are not included in the minimum requirements during City events, meetings, and trainings.

This guide, intended for City staff, has been a much needed and highly requested resource. Specifically, the guide is for those developing or sourcing training or otherwise leading events, whether for the public or employees. In addition, portions of this guide can support internal city meetings, trainings, events, and presentations that will help improve accessibility and engagement.

Title II requires that all programs, services, and activities of the City of Portland be accessible to people with disabilities. General requirements include:

- People with disabilities must not be denied access to programs, services, or activities because of inaccessible facilities.
- Bureaus must ensure communication with people with disabilities is as effective as is communication with people without disabilities.
- Bureaus must be prepared to modify policies, practices, and procedures to accommodate people with disabilities.

The Americans with Disabilities Act (ADA) of 1990 Provides protections to individuals with disabilities in the areas of employment, state and local government services, public accommodations, and telecommunications. https://www.ada.gov

Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d et seq.) Prohibits discrimination on the basis of race, color, and national origin (language access) for federally funded programs, including all City of Portland programs, services, and activities. https://www.justice.gov/crt/fcs/TitleVI

Executive Order 13166 Improving Access to Services for Persons with Limited English Proficiency.   Language Access. Requires reasonable steps to ensure that persons of Limited English Proficiency (LEP) have meaningful access to government programs, services, and activities. https://www.lep.gov/executive-order-13166

Executive Order 12898 Federal Action to Address Environmental Justice in Minority Populations and Low-Income Populations . Requires substantial and comprehensive community engagement to help address disproportionately high and adverse human health or environmental effects of programs on minority and low-income populations. The goal is to ensure all communities and people live in a safe and healthy environment. https://www.archives.gov/files/federal-register/executive-orders/pdf/12898.pdf (EPA overview https://www.epa.gov/laws-regulations/summary-executive-order-12898-federal-actions-address-environmental-justice)

Guide Objectives

I. Provide information about accessibility and equity considerations as guidelines to develop inclusive trainings and events regardless of the subject matter.

II. Identify best practices to ensure equitable development, review, and implementation of City of Portland trainings and events.

III. Provide resources to ensure compliance and accessibility of all training and event material.

IV. Center Title II, Title VI, and Title 23 to ensure federal and City compliance in all City trainings, public events, and internal city meetings.

Quick Overview

The guide is divided into sections that cover all aspects of training/event planning from a Citywide perspective. In this guide, you will find best practices for hiring a facilitator and developing training materials, as well as information related to the review or self-assessment of a training, which may vary depending on your bureau's capacity. Additionally, you will be provided with many resources throughout this guide. Some of those resources include recommendations to encourage participant engagement and healthy interactions during learning events and a checklist to assist you when sharing on-demand learning resources. Our aim is to make trainings and events more accessible, equitable, and inclusive.

We have also included an entire section on how to plan accessible trainings and events. This part of the guide reflects a high degree of accessibility in accordance with Title II. Some facilities may not meet all the criteria outlined in this guide.

The section is intended to help you identify accessibility features and guide you in programmatic workarounds that will help you establish a welcoming environment for people of all ages and abilities. If a bureau has questions about the accessibility of a City facility, it should contact Facilities (https://www.portlandoregon.gov/dam/article/550812).

If you are new to developing training and/or planning accessible events, we recommend reading the entire guide. You may also find resources through your

bureau's equity manager, ADA coordinator, and/or training specialists. The table of contents will allow you to easily refer to specific sections of the document as needed. You can also open the Navigation Pane by clicking on the search box at the top of the document. The Important Terms section (pages 7-8) helps clarify many of the concepts discussed. The Minimum Expectations section (pages 16-17) is geared toward helping you get started in planning more accessible events and trainings.

> These minimum expectations will help us transition away from requiring people with disabilities to repeatedly request accommodations several days ahead of time and toward the expectation that certain accommodations will be standardized for events offered by the City of Portland.

Quick Links

The following links are provided so you can easily refer to specific documentation. It is organized in alphabetical order, and you will also be able to find them throughout this guide.

- Access tip on using plain language
  https://www.portlandoregon.gov/civic/article/674046
- ADA Checklist for Existing Facilities
  https://adachecklist.org/
- Chapter 1.03 Code of Ethics
  https://www.portland.gov/code/1/03
- City's Core Values
  https://www.portlandoregon.gov/bhr/article/763427#:~:text=testimony%20and%20discussion),Adopt%20Anti%2DRacism%2C%20Equity%2C%20Transparency%2C%20Communication%2C%20Collaboration,%2C%20policies%2C%20practices%20and%20procedures
- City's Meaningful Access Statement
  https://www.portland.gov/officeofequity/equity-title-vi-division/meaningful-access-statement
- City of Portland Accessibility Tips
  https://www.portland.gov/civic/disability/access-tips

- City of Portland Audio Descriptions
  https://www.portland.gov/civic/disability/audio-descriptions
- City of Portland eLearning Content Design Guidelines
  extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.portlandorego
  n.gov/bhr/article/758500
- Conflict of Interest Definitions & Form
  https://www.portlandoregon.gov/civic/article/725028
- Discrimination, Harassment & Retaliation Prohibited (HR 2.02)
  https://www.portland.gov/policies/human-resources-administrative-
  rules/equal-employment/hrar-202-prohibition-against
- Executive Order 12898 Federal Action to Address Environmental Justice in
  Minority Populations and Low-Income Populations (EPA overview).
  https://www.archives.gov/files/federal-register/executive-
  orders/pdf/12898.pdf
- Executive Order 13166 Improving Access to Services for Persons with
  Limited English Proficiency.
  https://www.lep.gov/executive-order-13166
- Facilities Contact List
  https://www.portlandoregon.gov/dam/article/550812
- Fragrance free workplace
  https://www.portland.gov/sites/default/files/2020-06/4-03-dress-
  appearance-fragrance-in-workplace.pdf
- Ground rules + tools. Facilitating productive discussions
  https://www.ucar.edu/who-we-are/diversity-inclusion/community-
  resources/ground-rules-tools
- Planning accessible temporary events
  https://adata.org/guide/planning-guide-making-temporary-events-
  accessible-people-disabilities
- Policy number BTS-3.04 - Captioning of video and audio material
  https://www.portland.gov/policies/technology-services/e-government/bts-
  304-captioning-video-and-audio-materials

- Principles of Adult Learning & Instructional Systems Design
  https://www.nhi.fhwa.dot.gov/downloads/freebies/172/PR%20Pre-
  course%20Reading%20Assignment.pdf
- Public Officials Ethics & Responsibilities
  https://www.portland.gov/code/1/03
- Oregon Government Ethics Law, A Guide for Public Officials
  https://www.oregon.gov/ogec/Documents/2021%20PO%20Guide%20Final
  %20Adopted.pdf
- The Americans with Disabilities Act (ADA) The Americans with Disabilities Act
  (ADA) https://www.ada.gov
- Title VI of the Civil Rights Act to 1964 (42 U.S.C. § 2000d et seq)
  https://www.justice.gov/crt/fcs/TitleVI
- Virtual Learning Environment Best Practices
  https://www.portlandoregon.gov/bhr/article/761631

Important Terms and Definitions

Throughout the document, words like "events," "meetings," and "trainings" will be
used interchangeably to highlight the versatility of this guide for all City events
(whether they are public facing or employee-only meetings). Similarly, this guide
uses terms like "trainer" and "facilitator" interchangeably as a reminder that
choosing a good facilitator/trainer applies in all settings where someone will be
leading a group.

Additionally, you may encounter terms that are new to you. This section will define
important terms.

- Alternative (alt) text is the written description of an image. Alt text can be
  accessed by assistive technologies, like screen readers as well as by hovering
  over the image with your cursor. It does not interfere with the text everyone
  sees. The description should communicate the points behind the reason why
  the image has been included. (https://support.microsoft.com/en-
  us/office/everything-you-need-to-know-to-write-effective-alt-text-df98f884-
  ca3d-456c-807b-1a1fa82f5dc2)

- American Sign Language (ASL) is the primary sign language used in the United States, but it is not the only sign language. Different countries have different sign languages, and no sign language is a word-for-word translation of any spoken language. Each sign language is an individual language.
- Audio description is when visual aspects of television, movies, and theater are described. Typically, a person who is blind or low vision will use a headset to listen to the narrations. The narrations are added in spots where there is an absence of dialogue and/or important sounds.
- Braille is not a language. Braille is a system of raised dots on a surface that is used to reproduce written languages for those who are blind or low vision.
- CART stands for communication access real-time translation. CART is the system behind closed captioning. A person types the words being spoken and they appear on the screen.
- Large print is a concept that is easy to understand but harder to define. Generally, a font size of at least 18 points should be used. A sans serif bolded font is also recommended. Recommended fonts to use include Verdana, Helvetica, Tahoma, and Arial. If you are regularly working with someone who uses large print, ask them how you can best format documents for them.
- PDF stands for Portable Document Format. The PDF format is used to present documents, including text formatting and images, in a manner independent of applications, software, hardware, and operating systems.[1]
- Sans serif font is accessible because the letters do not have a curve/detail on the edges. In French, the word "Sans" means "without," and "Serif," which is of unknown origin, means "line/pen stroke."
- Screen reader's most basic function is to read the contents of the computer screen through synthesized speech. Screen readers read both the text that is displayed and that which is typed.
- Wheelchair lift, also known as a platform lift, is designed to raise a wheelchair and its occupant over a step or other vertical barrier.

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[1] Adobe Systems Incorporated, PDF Reference, Sixth edition, version 1.23 (53 MB), Nov 2006, p. 33.

Best practices when planning a training or an event

Key Learnings and Tools

> ➢ Title II of the Americans With Disabilities Act requires that all programs, services, and activities of the City of Portland be accessible to people with disabilities.
> ➢ Determine the "who," "why," and "what" to develop effective trainings and ensure that they are the appropriate approach.
> ➢ Adhere to the provided screening process when selecting outside trainings and materials.
> ➢ Ensure that presentations provide basic features of accessibility without participants requesting them.
> ➢ Develop Accessible Event Notices that adhere to ADA requirements.
> ➢ Utilize the ADA Checklist for Existing Facilities https://adachecklist.org/ to determine site accessibility.

Choosing an Accessible Location

During initial event planning, the ADA Checklist for Existing Facilities https://adachecklist.org/ should be used to determine site accessibility. The ADA Checklist for Existing Facilities is based on the 2010 ADA Standards for Accessible Design (2010 Standards). Full compliance with the 2010 Standards is required only for new construction and alterations. Facilities built or altered prior to March 15, 2012, must only comply with the 1991 ADA Standards for Accessible Design (1991 Standards). This guide is not intended to tell you exactly what must be done to comply with either the 2010 or 1991 Standards; rather, this guide will help you learn what to consider when you are planning an event. If you are concerned that something at a facility may not be accessible, use the ADA Checklist as a guide. A site assessment should include the event space and the facility in general.

Site accessibility considerations for people who are blind or low vision
The following accommodations will help people who are blind or low vision access an event/training:

- **Elevators:** Elevators should have an auditory signal to notify people of the different floors.
- **Lighting:** Areas should be well-lit and contain adjustable lighting.
- **Pathways:** Paths of travel should be free of obstacles that cannot be detected by the sweeping of a white cane. Generally, obstacles in paths of travel should not be between 27 and 80 inches high; additionally, obstacles should not stick out more than four inches from walls unless they are low enough to be detected by someone using a cane.
- **Printed Signs:** Print signs marking locations for people with low vision should contrast with their background (either light characters on a dark background or dark characters on a light background). Minimum character height depends on the expected viewing distance. If you think there may be an issue, refer to the section on minimum character height https://www.ada.gov/regs2010/2010ADAStandards/2010ADAstandards.htm#titleII. It is a chart found at the above link in section 703.5.5.
- **Service Animals:** For the benefit of service animals, the facility should offer a relief area. This could be as simple as a tree with dirt around it.
- **Tactile Signs:** Raised letters and/or braille should at least mark meeting rooms and restrooms. Tactile signage should be between 48 and 60 inches from the ground. Signage for single doors should be on the latched side. For double doors with one active leaf, the sign should be near the inactive leaf. For two active double doors, the sign should be to the right of the right door. Eighteen inches of clearance should exist between the ark of the swinging door and the tactile sign.

Site accessibility considerations for people who are deaf or hard of hearing

The following accommodations will help people who are deaf or hard of hearing access an event/training:

- Rooms should be equipped with alternative emergency alert systems such as visual alarms and indicators.
- Each elevator should have a visual cue system to notify someone who is deaf or hard of hearing of elevator controls and an emergency communication system that does not require speaking.

- You should check for noise levels coming from ventilation systems or other rooms. Obviously, there may not be much you can do about noise coming from other rooms, but awareness of the problem may help influence your choice of sound system.

Site accessibility considerations for people using a wheelchair or other assistive mobility device

Exterior access

The following exterior accommodations will help provide training/event access for people using a wheelchair or another assistive mobility device:

- If the accessible entrance is not the entrance participants without disabilities are using, have signage directing people to the accessible entrance.
- If you know you have several participants using chairs and a limited number of accessible parking spaces, consider designating multiple spaces as accessible or creating a drop off area. Ideally, one of every 25 parking spaces would be accessible and one of six accessible parking spaces would be wide enough (132 inches) to accommodate a van.
- The accessible parking spaces should be located near the accessible entrance.
- You should check whether there is a curb cut or level access from the accessible parking area to the entrance.
- There should be a barrier-free path of travel from the parking lot, drop off area, and public transit to the event entrance, avoiding stairs, sudden changes in level, slippery or unstable ground, or objects obstructing the path of travel.
- Ramps should be gradual in slope (one inch of rise for 12 inches of run) and have handrails on both sides.
- The site should be accessible by public transit. Notify participants of the number of blocks between public transit and the meeting space. More than three blocks could be difficult for some participants.

Interior access

- An accessible entrance (preferably the main entrance) should be wide enough for a person using a wheelchair or scooter. This means the doorway should be at least 32 inches wide with the door open 90 degrees.
- Accessible entrances should be well-lit and not isolated.
- Clearly notify participants if the accessible entrance is locked or requires someone to ring a bell to enter.
- Check the weight of the door. The 2010 Standards specifies the weight of resistance that doors can have. For exterior doors, the specification is eight pounds. For interior doors, it is five pounds. If you cannot open the door with the pinky on your weaker hand, it will likely be a challenge for someone using a mobility aid.
- Door handles must be easy to open with a closed fist and must not have knobs.
- Provide signage that demonstrates an accessible route from the accessible entrance to the event location.
- Elevators should be near the location of the event and must be large enough to accommodate a power wheelchair or scooter (at least 36 inches wide and 54 inches deep). At those dimensions, a person using a wheelchair cannot turn around. So, larger cabs are preferred.
- Elevator controls should be at a comfortable height for a person using a wheelchair or scooter. If you are seated and the controls are higher than your head, the controls are too high.
- Contact any participants you know are attending and ask them how you can. accommodate them, or stage a volunteer to operate the elevator.
- Where lifts are used instead of elevators, make sure you know how to operate them and that you have a key. When possible, the key should be left by the lift for independent access.
- Each restroom should have one accessible stall.
- There should be at least one accessible restroom on the same floor as the event.

- Major hallways throughout the facility should be wide enough (at least 60 inches) to allow for people using wheelchairs and scooters to pass in both directions.
- Pay attention to floor surface. Some people may have challenges on thick pile carpets.
- All participants should be able to sit in the same area. People using wheelchairs, scooters, those with service animals, or others with mobility aids should not be seated in a segregated area.
- People should not be seated with their backs to one another.
- The reception and/or refreshment areas should be large enough for people using a wheelchair or scooter to circulate. Ideally, an aisle width of 72 inches would be offered. A minimum aisle width of 36 inches is acceptable.
- Stages and speaking areas, including lectern or podium, should be accessible to people using a wheelchair or scooter.
- Cables and wires should be secured and out of the paths of travel.
- Registration and customer service desks should be low enough (no more than 36 inches high) for people using a wheelchair or scooter to see over them.

Minimum Expectations when Choosing an Accessible Location

This document suggests a high degree of accessibility. This section will help you learn what should be your starting point for planning more accessible events and trainings.

Physical access

For our purposes, good physical access is defined as the following:

- There should be several accessible parking spaces located near an accessible entrance.
- The event should be held in a room that can be accessed by someone using a wheelchair or other assistive mobility device. In other words, the meeting room can't be upstairs unless there is an elevator or lift.
- There should be at least one accessible restroom on the same floor as the event or that can be accessed via elevator or lift.

- Unless you are providing an accessible shuttle, the event should not be more than three blocks from public transportation.
- If you are having at least five events that are similar in nature (budget meetings, opportunities to provide project-specific testimony), at least 60 percent of the similar events should provide necessary physical access for people who use wheelchairs or other assistive mobility devices.
- When you have between two and five similar events, at least one should offer necessary physical access.
- For unique events, every effort must be made to achieve necessary physical access.

Access for people who are blind or low vision

- Every event that offers print materials to those in attendance should make 10 percent of the available copies large print. This should happen whether anyone requests large print or not.
- Any electronic information about the event (especially registration and promotional materials) should be accessible to people who use screen readers.
- Any online registration forms should be accessible to people who use screen readers.

Ensure that the location where training will be held is accessible. If it has more than one entrance and not all are accessible, be sure to communicate which entrances are accessible.

Plan and Prepare for Different Types of Accommodations

Language assistance services

- Please ensure that you have scheduled and/or planned for closed captioning. Some online meeting platforms have the option for automatic closed captioning. This is not as effective and accurate as live closed captioning, and it is preferable to schedule a live captioner. If someone requests captioning for an online meeting, a live captioner must be

provided. Every effort must be made to provide reasonable
accommodations when they are made, to include live closed captioning.

- Schedule closed captioning.
- Schedule requested language resources. Language assistance services, this
  includes language line and onsite/ American Sign Language (ASL)
  interpretation resources. As a City staff you have options for providing these
  services: Go to [Translation and Interpretation Services Citywide Contracts](https://www.portlandoregon.gov/brfs/index.cfm?&c=63023)
  https://www.portlandoregon.gov/brfs/index.cfm?&c=63023.
  a. You can go directly to a company for services under $10,000 and pay
     them with a (DPO) or P-card.
  b. You must consult with your manager/supervisor and/or bureau's
     accounting team (as applicable) before making any decisions.
  c. Use a state of Oregon contract and reference the state contract
     number. See attached list in the link provided. Confirm state of
     Oregon contractor status with your bureau's accounting team.
- Here are some additional links for PP&R staff:
  a. [How to call an interpreter using Language Line](https://portlandoregongov.sharepoint.com/sites/gt-parks-intranetsite/Shared%20Documents/Equity%20HUB%20(Helping%20Understand%20Best%20Practices)/Language%20Access/How%20to%20call%20an%20interpreter%20using%20Language%20Line.pdf)
     https://portlandoregongov.sharepoint.com/sites/gt-parks-
     intranetsite/Shared%20Documents/Equity%20HUB%20(Helping%20U
     nderstand%20Best%20Practices)/Language%20Access/How%20to%20
     call%20an%20interpreter%20using%20Language%20Line.pdf
  b. [PP&R Language Access folder on Teams Equity HUB](https://portlandoregongov.sharepoint.com/sites/gt-parks-intranetsite/Shared%20Documents/Equity%20HUB%20(Helping%20Understand%20Best%20Practices)/Language%20Access)
     https://portlandoregongov.sharepoint.com/sites/gt-parks-
     intranetsite/Shared%20Documents/Equity%20HUB%20(Helping%20U
     nderstand%20Best%20Practices)/Language%20Access
  c. [Quick Reference for Language Assistance Services](https://portlandoregongov.sharepoint.com/sites/gt-parks-intranetsite/Shared%20Documents/Equity%20HUB%20(Helping%20Understand%20Best%20Practices)/Language%20Access/Quick%20reference%20-%20Language%20Assistance%20Services.pdf)
     https://portlandoregongov.sharepoint.com/sites/gt-parks-
     intranetsite/Shared%20Documents/Equity%20HUB%20(Helping%20U
     nderstand%20Best%20Practices)/Language%20Access/Quick%20refer
     ence%20-%20Language%20Assistance%20Services.pdf

Personal care attendance

Personal care attendants (PCAs) typically assist people with disabilities with
personal needs and getting to and from events. If someone needs a PCA, they

must bring one with them. We do not provide personal services. Registration forms should ask about PCAs. PCAs should be able to attend events free of any registration fees.

Dietary considerations

When planning events where meals and/or refreshments will be served, you should:

- Include PCAs and interpreters in the estimated number of participants.
- If beverages are being served, provide bendable straws and lightweight cups.
- Offer sugar-free beverages for people with dietary concerns or medical concerns.
- Buffets may present challenges for people who are blind or low vision and people with mobility disabilities. If catering staff is not provided, make sure staff is available to assist those who may need help navigating the buffet.
- Allow participants to indicate their dietary needs on any registration form. Or let them know how to share their dietary needs in any invitation.

Emergency procedures

- Discuss evacuation plans and procedures with the facility's manager in the early stages of event planning.
- Invite event participants to identify their evacuation needs during the registration and/or invitation process.
- Provide the facility's manager with a list of those wanting assistance in the case of an evacuation.
- At the beginning of the event, advise participants of the emergency exits near the meeting room and the restrooms.

Best Practices for Choosing a Training and Choosing an External/Internal Facilitator

Choosing a training

Carefully consider why you are requesting a training or planning a training event and what the objectives are. Determining the "why" and "what" will help support the development of effective trainings and ensure that they are the appropriate approach.

If you have an isolated incident, that is not an ongoing concern or only involves one to two people, we recommend you consider different avenues before settling on a training, e.g., supervisor/manager intervention, professional development classes, "buddy" type systems, etc.

Just as importantly, it is necessary to consider the training audience and their ability to access the training. Make sure to ask yourself, "What is my plan to ensure that everyone can access the training?"

Choosing and external facilitator

- If trainers/facilitators are external from the City, they should provide their resume, including their experience and qualifications pertinent to the subject matter.
- Request and review primary content creator and/or organization's mission and values to evaluate if or how they align with the City's Core Values.
- Request a copy of the vendor's Voluntary Product Accessibility Template (VPAT).
- Manager or supervisor's approval. (For internal trainers only)
- At least two reference checks. (For external trainers/facilitators)
- Create a plan and prepare two or three questions to ask the trainers/facilitators references. For example, "What trainings/meetings did the facilitator/trainer deliver for your organization?" "How would you describe the trainer/facilitators overall performance?" "How was the trainer/facilitator's interaction with the audience?" "What is their personal/professional commitment to accessible, equitable practices?" If

they work for a company: "What is the company's commitment to accessible and equitable practices?"*

- Provide the trainer/facilitator with a copy of the Racial Equity Lens Tool https://www.portlandoregon.gov/oehr/71685.
    o If the trainer is external, make sure to schedule a time to review those documents with them.
- Provide the trainer/facilitator with a copy of the City's Core Values https://www.portlandoregon.gov/bhr/81500.
    o If the trainer/facilitator is external, make sure to schedule a time to review it with them.
- Take time with the trainer to explain your bureau, division, and/or team's culture. This is a vital step for the trainer to know and understand the audience.
- Set a clear expectation to meet at least twice with the trainer prior to the training event.

If one person from the bureau has had the opportunity to evaluate the trainer by attending their training event, the trainer or facilitator will only need to provide one reference. If two people have assessed the trainer, this step can be skipped.

Create Accessible & Inclusive Training/Event Materials

The following is a list that needs to be considered when developing presentations. It is essential to ensure that presentations provide fundamental features of accessibility without participants requesting it.

Creating accessible presentations

- Most bureaus have PowerPoint/Google Slides templates for presentations with consistent colors and header/footer banners. If you design your own for special training, ensure that the color, design, and format are consistent throughout the presentation.
- When developing training slides, it is best practice to use the formats already provided by PowerPoint/Google Slides rather than creating your text boxes, because the content flow is already determined and will save you time and make it accessible for screen readers.

- Use accessible fonts such as Arial, Calibri, Helvetica, Tahoma, Times New Roman, and Verdana. Make sure the font size is at least 18 for low vision users and seniors.
- Use consistent plain language and bullet points throughout the presentation; this makes it user-friendly.
- Be sure to summarize or use brief descriptions. Remember, it is a slide, not a novel. Some people recommend using the six-by-six rule; six words per line and six lines per slide. Please note that white space is essential for people whose English is not their first language and people with specific disabilities.
- Provide alt text for photos, images, or graphs to make it accessible for people who are blind or have low vision.
- Be sure that your presentation has good contrast.
  a. Contrast checker options:
     https://webaim.org/resources/contrastchecker/ and
     https://colorandcontrast.com/#/
- Color on color and light colors are challenging to see.

Things that you want to avoid during a presentation

- Avoid using all caps; instead, use tall and short letters to be user-friendly.
- Avoid italicizing because this changes the shapes of the letter.
- Avoid underlining because this creates difficulties distinguishing letters.
- Avoid justifying an entire text because it makes it difficult for readers. It is best to align the text to the left or middle.
- Avoid using colors and formatting to communicate or differentiate information. For example, in the case of City-wide emails, the word "new" is used for newly added information rather than simply relying on red or italicized words.
- Avoid using gif and keep animations/actions to the minimum: Screen readers cannot read these until they stabilize. If too many of them exist, the screen reader user cannot keep up.
- Ensure that the order of the content is correct. You can verify by opening your presentation in the PowerPoint App and selecting "display the reading order pane," which can be found in the top search bar. Alternatively, you

can click "review" on the tools pane, click "check accessibility," choose "reading order pane."

- If you have links in your presentation, it is best practice to describe the landing page/document when a person clicks the link rather than telling them to click on it.

Creating racially inclusive training materials

- In your training promotional materials, presentations, or other materials, be sure to include the most up to date language when describing marginalized communities. Consult the City of Portland's Inclusive Writing Guide.
- If you need to include images of people in any of your training materials you should use images reflecting the diversity and intersectionality of age, racial, ethnic, disability, LGBTQ, and religious communities.
- Avoid images of stereotypes

Developing additional training or event material

Microsoft Word documents

- Sans Serif font (e.g., Arial, Calibri, Helvetica, Tahoma, Times New Roman, and Verdana) in size 12pt or larger is used.
- Headings are used and are in the right order (H1, H2, H3).
- Tables are simple and do not use "split cells" or "merged cells." It is important to make tables simple because users can navigate tables via keyboard shortcuts and assistive technology which rely on simple table structures.
- Video on how to make merged/split cells accessible
- Tables are not used for formatting.
- Alternative text is provided for all images and graphics.
  - Resource: Microsoft's Everything you need to know to write effective alt text. (https://support.microsoft.com/en-us/office/everything-you-need-to-know-to-write-effective-alt-text-df98f884-ca3d-456c-807b-1a1fa82f5dc2#:~:text=Turn%20on%20Automatic%20Alt%20Text%201%20Select%20File,is%20selected%20under%20Automatic%20Alt%20Text.%20See%20More.)

- o Resource: [The National Federation of the Blind discusses writing alt text.](https://www.afb.org/consulting/afb-accessibility-resources/improving-your-web-site) (https://www.afb.org/consulting/afb-accessibility-resources/improving-your-web-site)
- Hyperlinks are labelled.
  - o Example of labelled link: City of Portland.
  - o Examples of non-labelled hyperlinks: click here; read more.
- Colors meet contrast requirements.
  - o Resource: [WebAIM Color Contrast Checker](https://webaim.org/resources/contrastchecker/).
  - o https://webaim.org/resources/contrastchecker/
- Information should not be communicated only through changes in color and/or formatting, e.g., "read text in bold" or "required information is in red."

PDF documents

- Adobe Pro (not Adobe Reader) is required to create accessible PDF files. https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html
- Sans Serif font (e.g., Arial, Helvetica, Verdana) in size 11pt or larger is used.
- Heading styles are used and are in the right order (H1, H2, H3).
- Tables are simple and do not use "split cells" or "merged cells."
- Tables are not used for formatting.
- Alternative text is provided for all images and graphics
  - o Resource: [Microsoft's Everything you need to know to write effective alt text.](https://support.microsoft.com/en-us/office/everything-you-need-to-know-to-write-effective-alt-text-df98f884-ca3d-456c-807b-1a1fa82f5dc2) (https://support.microsoft.com/en-us/office/everything-you-need-to-know-to-write-effective-alt-text-df98f884-ca3d-456c-807b-1a1fa82f5dc2#:~:text=Turn%20on%20Automatic%20Alt%20Text%201%20Select%20File,is%20selected%20under%20Automatic%20Alt%20Text.%20See%20More.)
  - o Resource: [The National Federation of the Blind discusses writing alt text.](https://www.afb.org/consulting/afb-accessibility-resources/improving-your-web-site) (https://www.afb.org/consulting/afb-accessibility-resources/improving-your-web-site)
- Hyperlinks are labelled.
- Example of labelled link: City of Portland.
- Examples of non-labelled hyperlinks: click here; read more.
- Colors meet contrast requirements.

- o Resource: WebAIM Color Contrast Checker
  https://webaim.org/resources/contrastchecker/
- Information should not be communicated only through changes in color
  and/or formatting, e.g., "read text in bold" or "required information is in
  red."

PDF forms
- In addition to all standards in the PDF Documents section above.
- Form fields are appropriately named.
- Tool Tips are provided for form fields.
- Examples: "Use the dropdown calendar to select today's date" or "Type your
  first and last name."

Additional resources

Portland's Accessible Digital Content Team
If the above is a bit overwhelming, you should join Portland's Accessible Digital
Content Team. With more than 160 members from across the City, this group
meets regularly to share information and tips, get help, and have trainings. In the
team, you will find links to recordings of all of our previous meetings and trainings
as well as a host of resources related to creating more accessible digital content.
After clicking on the above link, all you have to do is confirm that you would like to
join the team.

Hiring People with Disabilities to Test Content
One important thing to remember is the value in having people who regularly use
assistive technologies test your content to ensure it not only satisfies automated
checkers but that it is usable to people who use assistive technologies. The best
way to do that is by using native users of assistive technologies to test your
content.

The City has recently worked with the Community and Engagement Liaison
Services program (CELS) to add native users of assistive technologies to CELS to
assist entities in ensuring their content is accessible to and usable by people with
disabilities. To learn more about the electronic content testers in CELS, visit this
page from the Office of Equity.

Minimum Requirements for Creating Accessible and Inclusive Training Materials

- It's important that people with disabilities come to expect an accessible presentation.
- Giving people early access to slides allows them to decide how they can best access the material.
- ASL is its own language. Depending on length of presentation, two interpreters may be required.
- Explain how to see captioning or ASL.
- Pictures and Images: Cover slides and photos are a good way to start the conversation. Be sure you describe the photos and that there is alt text.
- Minimize the use of active graphics in presentations – words or images that slide across the screen or swirl into place. These are not accessible to assistive technology and can be very distracting or harmful for people with cognitive disabilities.

Accessible event notices

Event notices should include:
- The City's meaningful access statement
  https://www.portland.gov/officeofequity/equity-title-vi-division/meaningful-access-statement.
- Accessibility features of the meeting location including the availability of any auxiliary aids and services that will be provided without request (such as sign language interpretation or captioning).
- Information about access barriers at the meeting site (such as a lack of accessible restrooms).
- The email address and phone number for someone assigned to answer requests for accommodations not automatically provided.
- A timeframe for requesting accommodations (at least three days prior to the event).
- A reminder that all events put on by the City of Portland are scent free
  https://www.portlandoregon.gov/citycode/article/12199.

- A reminder of which events will offer good physical access as defined in the minimum expectations section of this document.
- Public transportation to the site (optional).
- Parking availability (optional).

Posting notices online

Any event notice posted on the Internet or distributed via email should be accessible to people using screen readers:

- Images should be described.
- PDFs should be tagged for accessibility.
- Row and column headings in tables should be defined for screen readers.
- Forms should be accessible.
- Text should never be provided only in images.
- Notices posted to social media should have their images described and all text contained in images should be typed into the body of your post.
- Information should never be communicated only using color or formatting.
- The text of links should clearly describe where clicking on the link will take someone.

An example of an accessible training or event notice

> City Hall can be accessed via the MAX Green Line and is accessible to people using wheelchairs or other assistive mobility devices. Real-time captioning of the event will be provided. Large print programs will be available. Other materials are available in alternative formats upon request. Please make your request for alternative formats and/or other accommodations to John Doe at least three business days prior to the event. Call John at XXX-XXX-XXXX. Or email John.Doe@PortlandOregon.gov.
>
> It is the policy of the City of Portland that no person shall be excluded from participation in, denied the benefits of, or be subjected to discrimination in any City program, service, or activity on the grounds of race, color, national origin, disability, or other protected class status. Adhering to Civil Rights Title VI, ADA Title II civil rights laws, and City of Portland administrative rules and policies, the City of Portland ensures meaningful access to City programs, services, and activities by reasonably providing: translation and interpretation, modifications, accommodations, alternative formats, and auxiliary aids and services. To request these services, contact 503-823-2525, Relay Service: 711.

Here are a few guidelines before and after the presentation.

- PBOT Public Involvement Guide requirement.
  https://www.portlandoregon.gov/transportation/article/742972
- Offer accessibility options in the meeting invitation.
- Consider sharing slides in advance if it is appropriate and maintains the integrity of the training.

Best practices for inclusive Social Media campaigns

- Hashtags are placed at the end of a post, not the beginning.
- The first letter of each word in a hashtag is capitalized, e.g., #WeArePortland.
- Links have been shortened using a URL-shortener such as Bitly.
  https://bitly.com/
- Alternative text is provided for all images and graphics.

- o Resource: Microsoft's Everything you need to know to write effective alt text. https://support.microsoft.com/en-us/office/everything-you-need-to-know-to-write-effective-alt-text-df98f884-ca3d-456c-807b-1a1fa82f5dc2
  - o Resource: The National Federation of the Blind discusses writing alt text. https://nfb.org/blog/global-accessibility-awareness-day-post-three-describe-it-well-help-your-users-get-picture
- Colors meet contrast requirements, especially for graphics or infographics
  - o Resource: WebAIM Color Contrast Analyzer. https://webaim.org/resources/contrastchecker/
- If linking to external content, indicate you don't control the content (credit the organization that created the content).
- Try linking to accessible external content.
- Captions are provided for all City-made videos.
- Do not rely on automatic captions.
- Edit automatically-generated captions
  - o Resource: YouTube captions and translations help https://support.google.com/youtube/answer/4792576?hl=en
  - o Resource: Zendesk captioning guide (https://experiencewelcome.zendesk.com/hc/en-us/articles/4402364136724-Closed-Captions-Guide)
  - o Resource: CADET captioning software ncamftp.wgbh.org/cadet/
- Transcripts are included with all City-made podcasts.
- Audio description is provided for all City-made videos.
  - o Resource: The American Council of the Blind's All About Audio Description. https://www.acb.org/audio-description-project
  - o Resource: 3Play Media has The Ultimate Guide to Audio Description. https://www.3playmedia.com/learn/popular-topics/audio-description/
- Site-specific resources for social media: https://technicallyfunctional.org/2020/04/02/social-media-accessibility-best-practices-for-instagram-twitter-and-facebook/

- o [Facebook accessibility](#)
  https://www.facebook.com/help/273947702950567
- o [Twitter accessibility](#)
  https://help.twitter.com/en/resources/accessibility
- o [Instagram accessibility](#) https://help.instagram.com/308605337351503
- o [Google accessibility](#) https://www.google.com/accessibility/
- In any social media campaigns, be sure to include the most up to date language when describing marginalized communities. Consult the City of Portland's [Inclusive Writing Guide.](#)
- If you need to include images of people in the social media campaign, use images reflecting a diversity and intersectionality of abilities, ages, body types, racial and ethnic identities, gender identities, and religious communities.
- Avoid images of stereotypes.

Sharing on-demand resources

It is recommended that each bureau and/or division have a point person when it comes to sharing information regarding training. The person who shares the information must be able to answer the following:

For online/printed learning resources: Such as books, PDFs, newsletters, articles
- Is the source reliable or is it a spam?
- Do the graphics and icons include text descriptions and/or alt text?
- Are there any interactive elements? If so, are they keyboard navigable?
- Are there form fields in the document? If so, are they labeled and tagged properly?
- Is the text content hierarchically structured?
- Is there three-table content in document? If so, is it properly structured?
- Is there color contrast on the document? If so, is there adequate contrast between foreground and background colors?
- Is the document relying on color to provide information?

- Did you review the primary content creator and/or organization's mission and values? If so, did you ensure that they are in alignment with the City's Core Values?
- Did you take time to review the information? If so, does it support our City's Core Values or does it create conflict? You are encouraged to share the information with at least two to three parties prior to sharing it.
- Does the document have an alternative form of delivery, such as an audio book or translated copies?

For virtual learning events: Such as webinars, training, etc.
- Did you review the primary content creator and/or organizations missions and values? If so, did you ensure that they are in alignment with the City's core values?
- Is the learning event in alignment with the Virtual Learning Environment Best Practices mentioned above?
- Did you take some time to review the organizations review or historical impact?

For in-person learning events: Such as training, workshops, etc.
- Please review the following document: [Accessible Meeting and Event Checklist](https://accessibility.usc.edu) https://accessibility.usc.edu/accessibility-at-usc/event-accessibility/accessible-event-checklist/#:~:text=Accessible%20Event%20Checklist%201%20Selecting%20a%20location%20The,assistive%20listening%20devices%20...%204%20During%20event%20 which provides guidance for ensuring that learning events are accessible all participants.
- Please ensure that the learning event is in alignment with providing an inclusive and accessible space as described in the document bellow.

If the event is in person, provide an access plan and evaluate the place for people with disabilities. If the space has a plan, make sure that it provides appropriate accommodations.

Balance of information-sharing
Please ensure that there is balance with the type of information being shared whenever it is appropriate and available. For example, if you recommend three

books to read, also recommend three podcasts, if there is a tendency in your team to only provide webinars, make sure you are also providing options for in-person events. Make sure that you are tending to multiple learning styles/preferences.

Key Takeaways

> ➢ Familiarize yourself and training partners with Title II of the Americans With Disabilities Act.
> ➢ Throughout the process of developing training sessions and materials, continue to ask yourself: Who is my audience? What are my learning objectives? Why is this training necessary?
> ➢ Be sure to address how you are accommodating the needs of people with physical disabilities (are there accessible bathrooms?), people who are blind or low vision (is all electronic material compatible with a screen reader?) and people who have mental health disabilities (is language reflective of medical terminology throughout the training?).
> ➢ If you are unsure if you are meeting requirements, reach out to your bureau's ADA coordinator or the ADA Title II and disability equity manager in the Office of Equity and Human Rights.

Inclusive practices when implementing trainings

Key Learnings and Tools

> ➢ Identify areas of training that may rely on someone's ability, whether sight, hearing, physical, or cognitive, and develop ADA accommodations so that all material is accessible.
> ➢ Communicate language, both spoken and written, that places the importance on people first.
> ➢ Prepare yourself, your audience, and/or guest speakers through multiple means of communication, always adhering to Title II requirements.
> ➢ Lead with trauma-informed practices through language, activities, and use of time.
> ➢ Utilize facilitator and group agreements at the beginning of every presentation to build community trust and participation.

Effective Communication for Trainings and Events

The following sections are intended to ensure effective communication for people who have physical or mental health disabilities. Please review this section as you plan your next training or event.

Introductions matter

- Acknowledge participants as they come in.
- Have an introductory or welcome screen visible with the instructor's name, title, and course title.
- If the training is online, welcome people through the chat as well as verbally.
- If the training is in person, providing name tags or desk tags for people to write their names/pronouns and have them in a legible place may be helpful for both the facilitator and participants.
- Introduce yourself before you speak and ask participants to do the same. People may not be able to recognize voices after one meeting, there may be too many faces on a screen, and blind or low vision participants may not be able to see faces completely.

- As you introduce yourself, provide people with your pronouns, if that is comfortable for you, and invite others to share their pronouns if it is comfortable for them.
- If time permits, go through introductions. This will enable people who are blind or low vision to begin to learn the voices of those in attendance.
- If audience participation is possible, introduce yourself to people who are blind or low vision and take down names.

Making your way through the presentation

- Start by identifying the slide design/format (banner, logos, colors) in your presentation. Throughout the presentation, you can periodically remind participants that your slides are still using the same design and format.
- Let people know what slide number you're on. For example, "moving on to slide...12, 13, 14," etc.
- Describe each slide and don't assume people can see your slides. For example, explain the image or graph that you are referring to rather than saying "as you can see on my slide…"
- You don't have to read every word on a slide, but be sure that your explanation is accurately summarizing the words on the screen.

Space and layout

- Remind participants of emergency plans, routes, and procedures before beginning the training or event.
- At the beginning of the meeting, tell participants the location of the restrooms. Make sure to let participants know which restrooms, if the answer is not all of them, have an accessible stall.
- Let participants know where the lactation room is and how to enter/sign up for time/space.

Rest and breaks

- At the beginning of the event, let participants know they are free to stand up and move around in the back of the room.
- At the beginning of the event, let participants know they are welcome to take care of themselves regarding biology breaks, such as needing to use the restroom or needing take care of other bodily functions.

- For events running longer than 90 minutes, build in a couple of short breaks. For example, build a 10–15-minute break into the schedule for every 45-50 minutes of training.
- For events longer than 90 minutes, offer a "quiet room" (if available) or other space where participants can go to take a break from the meeting.

Trauma informed communication

- When discussing potentially difficult subjects – such as violence, abuse, and traumatic events – provide content warnings. .
- When possible, provide space for self-reflection or journaling during or at the end of a training.
- Be prepared to support people's emotions and reactions knowing you may be unable to get through your presentation. Trainers and facilitators are encouraged to leave some "extra time" in their agendas rather than planning every second.
- Your presentation may have activities or visualization that ask for participants to close their eyes. Because this can be traumatic for some, it is best practice to tell participants, "If you are comfortable, close your eyes, soften your gaze, or turn off your camera (if applicable)," rather than just saying "close your eyes."

Create an inclusive learning experience

- Offer check-in questions and talking points (if existing) ahead of time.
- Moderate the pace of your speaking. This is helpful for everyone, and especially for participants for whom English is not their primary language and for people with cognitive disabilities.
- Do not require people to read a document during the meeting to participate. This could be difficult for someone with a disability that makes reading print difficult, or someone with a learning disability.
- Advise participants to minimize interruptions. When more than one person is talking, it is hard for interpreters and captionists to interpret or type everything being said.
- When a person who is blind or low vision raises their hand or in some way indicates a desire to participate, call on them by name.

- Remind people to say their name prior to speaking.
- When facilitating group discussion give people the option to "pass."
- Videos must be captioned for people who are deaf or hard of hearing. portland.gov/policies/technology-services/e-government/bts-304-captioning-video-and-audio-materials
- Videos can be audio described so that people who are blind or low vision can follow the action whenever possible. Though this is not a requirement, it is something to consider.
- Be aware of participants with cognitive disabilities or those who are neuro divergent.
- Recognize different lived experiences when creating training materials and delivering the training. If the context of the training specifically speaks to the lived experiences of Black people, Indigenous people, people of color, people who are disabled, LGBTQ+ people, or any other marginalized group, then you as the facilitator should acknowledge this with your participants. If the training includes sensitive or painful histories of racism in Portland *and* there is an expectation of discussion among participants after that content is presented, please consider providing a disclaimer or trigger warning when difficult content is about to be discussed. You should also evaluate the need to present triggering material in the first place. If it is essential, provide the opportunity for participants to view the material prior to or after the training, if they prefer, in an effort to minimize re-traumatization of individuals attending the training.
- Another way to be inclusive of participants' racial identities is to ask each participant to write their racial identity in their Zoom/Teams name or say their racial identity in their introduction if the training is in person.
- Reflect on the City of Portland values of Equity and Anti-racism. It is your responsibility as the training facilitator to plan and execute a learning experience that uplifts the participation of attendees who have less privilege relating to the subject of the training.

Word choice and language matters

In your presentation, written training materials, and when you're facilitating the training live in a group, be sure to include the most up to date language when

describing marginalized communities. Consult the City of Portland's Inclusive Writing Guide.

A few reminders:

- Use "people first" language. For example, use "person with a disability" rather than "disabled person," or "child with Down syndrome" rather than "Downs child."
- Use "typical" rather than "normal."
- Use "accessible parking" rather than "handicap parking."
- Use current medical terminology in line with best practices.
- Do not use the term "retarded" about someone with a disability, or yourself.
- Do not use terms like "crazy" and "psycho."
- Do not use terms related to mental illness or cognitive disabilities as adjectives e.g., "bipolar weather" and "OCD neatness."
- If you make a mistake, provide an apology, and continue. If a person in the audience "calls you out," listen and learn. Remember that people want to help you.

Provide the accommodations

- Require speakers to use the microphone.
- Provide anyone who requests it a copy of the agenda, event, or training materials in an alternative format (braille, large print, or email) prior to the event.
- Give a copy of the agenda, event, or training materials to all service providers (sign language interpreters or CART operators) at least a day before the event begins.
- Request materials from presenters with enough time to make sure they are accessible.
- Make sure materials are accessible. If materials cannot be made accessible, do not provide the inaccessible materials to anyone (whether they need an accessible version or not).
- Provide assistive listening systems for people who are hard of hearing when requested. Assistive listening systems amplify the sound via a transmitter used by the speaker and a receiver used by the participant.

- If available, provide signage offering assistive listening systems. Some rooms, like Council Chambers, have a hearing loop. A hearing loop is used by people wearing hearing aids. The hearing loop provides a magnetic, wireless signal that can be picked up by hearing aids.
- Be prepared to offer sign language interpreting and/or CART services upon request. For meetings lasting longer than an hour, two interpreters will be needed. Usually, interpreting services must be requested a few days before the event.
- In written materials and while orally presenting, use plain language. Leaving out jargon will make your presentations more accessible to many. The Office of Community and Civic Life has produced an access tip on using plain language. https://www.portlandoregon.gov/civic/article/674046
- Note there is a cost associated with interpretation and translation services. Anything with an associated cost must go through your bureau's approval process. Check out the previous section: Best Practices for Choosing a Training and Choosing an External/Internal Facilitator

Group Commitments During the Training or Event

The general recommendation is to start with at least five of the following group commitments of engagement and ground rules of interactions outlined below. These are subject to change and will be upgraded as needed. Many of these group agreements can also be applied to a day-to-day meeting space. It is essential to start even in the smallest spaces in the quest for equity and inclusion. It is recommended to lead with the same group commitments each time a meeting, training, or event begins, even if it is always the same people. Normalizing and reinforcing group commitments with regularity provide the continuity that builds an inclusive space where people may feel braver and more confident to participate.

Several group commitments of engagement and interactions have been used widely throughout the City in training and meeting spaces, as well as with community members and partners. The list is constantly changing and may need to be expanded depending on your audience and team's needs.

Trainer/facilitators commitment to the group
- Provide accommodation
- Tend to impact
- Real and imperfect
- Model inclusive language
- Manage time
- Compassionate and supportive learning environment
- Engage in personal reflection

Side note: At times, it may be necessary to make an interruption to give space for others to participate. Please share with the participants at the beginning of the training/event how sometimes you may need to interrupt someone to make space for others.

Group commitments to engage in a training
- Be real and imperfect: "I don't know" or "I need help:" Share with participants how people have different levels of knowledge and that it is ok to admit when someone needs more clarification or does not know/understand something. Also, highlight that the learning journey is not one for shaming others but rather to grow together; it is ok to be vulnerable and ask for support.
- Embrace both/and rather than either/or thinking: Please remind participants to be open to new ideas and ways of thinking. "What we all hunger for is a new world of choices without those poles of either/or pulling us away from the complexities of our everyday life" (Hardy, 1995, p. 57).
- Expect and embrace discomfort as a growth mindset and accept unfinished business: Please remind participants that during any learning journey and interaction, there may be times when discomfort is experienced. Please normalize these feelings for participants and invite them to view them as an opportunity for growth. Also, remind them that given time constraints, the group may need more time to finalize a topic or go in depth about a subject. Invite participants who need additional support to stay after the training/event to discuss any issues or provide clarification.

- **Listen to understand – Active listening:** Please remind participants to listen to learn and understand other perspectives. An excellent way to think about this is if you are listening to someone and immediately start thinking of the response and answer as they are telling you might be missing out on what they are saying. Also, remind participants to ask each other questions to deepen their understanding of someone's point of view.
- **Listen to yourself and pay attention to your needs. Use your reset time wisely:** Reminding participants of self-care, and that they are responsible for it, is essential. This means using the reset time to tend to their biological, emotional, or mental health needs rather than finishing work and using the training/session time to do those things. Please remind participants about this commitment before each break.
- **Respect confidentiality:** Remind participants to respect people's confidentiality. For example, if someone shares a personal experience during a breakout room, keep it from the larger meeting space; you can, in turn, ask participants to share what they learn rather than someone else's story.
- **Self-disclosure is self-decided:** Participants can decide to share at their comfort level.
- **Speak from your perspective and do so responsibly:** It would help if you highlighted to participants how everyone is still responsible for their behavior and interactions during the training events (HR2.02.)
- **Step up, step back:** Reminds participants that if they are not used to participating or feel uncomfortable participating, they are invited to please "step up," and if they are always the first to speak or interrupt others, ask them to please "step back" and make space for others.
- **Use "I" statements:** When sharing a story, make sure it is from your perspective and your experience by using "I" statements.
- **Use "oops" & "ouch":** If you say something that is hurtful or problematic and you realize it, you can say "oops" to acknowledge it and then try again. Alternatively, if someone else said something harmful or problematic, then you can say "ouch," which lets everyone know that there's something that needs to be discussed further.

Group commitments to interact during a training

- Be real and imperfect: "I don't know," "I need help."
- Expect and embrace discomfort as a growth mindset and accept unfinished business.
- Listen to understand.
- Respect confidentiality.
- Self-disclosure is self-decided.
- Speak from your perspective and do so responsibly.
- Step up, step back.
- Use "oops" and "ouch."

Additional tips for anti-racist language and group dynamics [2]

- "When you said or did... or when... happened."
- "I felt/I thought."
- "Because I think/feel I have experienced..."
- "And I'd suggest that... What do you think about it?"
- Prioritize the voices of people of color in the group.
- Prioritize people with disabilities in the group.
- Prioritize the voices of quiet folks in the group.
- Practice active listening and challenge respectfully.

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[2] Adapted from Challenging White Supremacy Workshops. Challenging White Supremacy Workshop : Workshops (cwsworkshop.org)

Key Takeaways

- Be sure to take your time and not rush through the material.
- PowerPoint, Word, and Excel each have accessibility checkers, but those do not guarantee accessibility. You must take proactive steps to ensure you know how to create accessible content.
- If you make a mistake during a presentation, simply acknowledge it, validate other people's feelings, and tend to the impact before moving on.
- Remove jargon and spell out/say full words instead of relying on acronyms.
- Provide "content warnings" before presenting material that may impact your audience. Give them the option to leave the room safely before embarking on the topic.
- Choose at least five group commitments and facilitator commitments to share with the audience before beginning the presentation.
- Verbalize emergency plans, routes, and procedures before beginning the presentation.

Review and Evaluate your Training or Event

Key Learning and Tools

> ➢ Recognize the training review process from planning, to reviewing, to implementation and evaluation.
> ➢ Incorporate a process that includes quality check, design analysis, accountability, subject matter review, facilitation considerations, and review.
> ➢ Design and implement an open team review process.

Quick Overview of the Training Review Process[3]

Plan & prepare	Read the training guide, which includes the following information: • Trainer selection and screening process • Legal requirements and policy considerations • Training selection considerations • Review process protocol • Training logistics process • What to expect – open team review process • Additional considerations • Creating an ADA Accessible Event
Review	Phase 1: • Quality Check • Design Check • Accountability Phase 2: • Subject matter review • Facilitation review (if applicable) Phase 3: • Open Team Review Process
Implement and Evaluate	• Deliver training and fill out roster within 48 hours after the training is delivered • Evaluate training and make necessary adjustments

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[3] Adapted from Mary Hetherington, eLearning industry 2013. Improving The Training Resource Review Process. Improving The Training Resource Review Process - eLearning Industry https://elearningindustry.com/improving-the-training-resource-review-process

> The training review process is a recommended action that should be taken in the training development process. By reviewing material, practitioners can ensure that all of the information presented in this guide has been considered. In this section there is a checklist to create some ease in the review process to support your implementation of the guide's principles.

Utilizing the review team will also bring support and multiple perspectives from subject matter experts that can be helpful in capturing different needs and requirements. The overall aim is to make sure we adhere to the City of Portland's Core Values of anti-racism, equity, transparency, communication, and collaboration as well as follow federal and local requirements to maintain compliance. People must also adhere to any internal policies and procedures in place. This section will provide you with the necessary tools to review your trainings. The goals of the training review process are to:

1. Provide observations and recommendations regarding the effectiveness and adequacy of the City's employee training programs and education initiatives.
2. Review training "best practices" and emerging training strategies to make recommendations on their applicability to your bureau.
3. Propose recommendations for training enhancements with the goal of improving the bureau's delivery of Review process protocol.

Quality check

This section reviews the training's administrative and language skill components to ensure they are successfully implemented. Please review the following documents:

1. City's Core Values
   https://www.portlandoregon.gov/bhr/article/763427#:~:text=testimony%20and%20discussion)-,Adopt%20Anti%2DRacism%2C%20Equity%2C%20Transparency%2C%20Communication%2C%20Collaboration,%2C%20policies%2C%20practices%20and%20procedures. An overview of the City core values along with their definition. Please note that this is the amended version. The core values are here to inform our workplace, practices, culture, systems, policies, and procedures.

2. [Virtual Learning Environment Best Practices](#)
   https://www.portlandoregon.gov/bhr/article/761631. This document
   encourages you to think about virtual meeting and training spaces as well
   as various strategies to ensure that you are providing an inclusive and
   accessible learning environment.

Design check

This section covers the instructional design and/or eLearning design principles,
digital accessibility and SuccessFactors technical standards. Please review the
following documents: ([City of Portland eLearning Content Design Guidelines](#))
https://www.portlandoregon.gov/bhr/article/758500

It is essential to reflect the personality of your bureau and its connection to the
people and nature it services.

Accountability

This section covers what tools will be used to measure training effectiveness and
create long-term accountability.

Subject matter review

This section allows you to invite people with experience or specialized knowledge
in the topic, areas, or methods that will be used during the training or event.

Facilitation considerations

*(Optional for training programs equipped to dedicate space to group
discussion/conversation.)*

Please note that this section may not apply to your training event. However,
review the following guidelines when having an open discussion/conversation:

- Include ground rules/agreements of interactions and engagement, examples
  of which are provided later in this guide. These rules/agreements are there
  to support you as a trainer/facilitator and to create a positive experience for
  the audience.
- As a trainer, you should have a plan to facilitate conversations where
  participants will be given the option to share their experiences and/or
  opinions.

- For diversity, equity, and inclusion training be extra cautious when approaching these conversations to prevent tokenism and/or re-traumatization of individuals. Prepare a plan to prevent tokenizing and to address conflict and/or disagreements in the meeting.
- If the training is unable to align with the points above, we recommend hiring and/or partnering with a qualified facilitator. (Please note that having difficult conversations can be uncomfortable. We also want to make sure that we are providing an inclusive and equitable space for staff attending these discussions to ensure everyone's engagement.)
- Highlight to participants that everyone is still responsible for their own behavior and interactions during the training events (HRAR 2.02.).

What to expect - open team review process

If your bureau has the capacity to provide an open team review process. Below you will find some suggestions for how you can implement that within your bureau. During this process consider the need for a quality check, design analysis, subject matter review, and any other facilitation considerations. The open review process is strongly recommended when providing bureau-wide trainings.

- Organize a team who can commit to meeting once a month. Remember that people are bringing their lived and career experience; diversity of thought, race, gender, sexuality, culture, ethnicity, disability, and beyond are valued in the feedback process. When considering professional experience, consider subject matter experts who have knowledge/experience in the following areas:
  - o Health and safety trainings
  - o Professional development trainings
  - o Diversity, equity, and inclusion training
  - o Accessible events and materials
  - o Facilitation
- Choose a specific day to have reoccurring meetings and a due date for materials.
- Allow up to three weeks for the review process to take place.

- Consider the amount of time it will take each person to review the material, both individually and as a group. Be transparent and provide the team with the approximate hours required.
- Consider including two people for each portion of the review process. It may be helpful to break it into two sections:
  - Quality check, design analysis and accountability areas.
  - Subject matter review and facilitation considerations (if any).
- Make sure to provide a list of written feedback. The list should include whether the training was approved, deferred, or approved with revisions.

We understand that the trainings will always have room for growth and improvement, so we encourage your trainers to continue to familiarize themselves with new concepts and to rely on surveys after the training is delivered.

Evaluating the training

Kirkpatrick Model: Four Levels of Learning Evaluation

A popular method instructional designers use to evaluate trainings is the Kirkpatrick Model created by Donald Kirkpatrick in 1954. The four levels of this model are, in order, Reaction, Learning, Behavior, and Results. Level 1, Reaction, aims to determine how the participants react to the training experience. Did the participants find the training useful? Evaluating the training at this first stage is important because you can quickly assess how satisfied and engaged participants are with the training information, format, trainer, etc. Level 2, Learning, aims to determine to what degree participants have acquired the intended knowledge, skills, and attitudes of the training. The focus of this stage of evaluation is assessing the effectiveness of the training content. Level 1 and 2 are relatively easy to measure by the trainer and should be completed shortly after the training has concluded. We suggest emailing participants the day of or the day after training has ended. Historically, City of Portland trainers usually evaluate their trainings at these first two levels because they are quick, follow-up tasks they have capacity to complete.

To evaluate your training more deeply, you should aim to assess your training at Level 3 and Level 4. Level 3, Behavior, analyzes how participants have transferred the learning from the training into their work processes or responsibilities. The method for evaluation Level 3 can take the form of a focus group conversation where you are primarily observing for change in participants' behavior. Results, Level 4, defines specific measures that are changed or improved as a result of the training. Level 3 and 4 can be difficult to measure and require more follow-up tasks and analysis from the trainer.

Level	Measure	Evaluation Description	Methods/Tools	When to Utilize
Level 1	Reaction	Understand how participants felt about the learning experience	Evaluation survey for both participants and trainers	Immediately after the training
Level 2	Learning	Measure increases in knowledge (before and after training)	Individual pre and posttest or interview	Immediately after the training
Level 3	Behavior	Measure the extent to which participants apply knowledge and skills	Facilitated group interview	3-6 months after training
Level 4	Results	Measure effect of training on the team's or bureau's business processes	Data analysis of metrics and key performance indicators	3-6 months after training

Planning

You should build your training around the desired outcomes in the Results level before you build the actual training content. It is encouraged to "work backwards" from Level 4 to Level one when designing your training experience. You can ask yourself this order of questions to plan the training:

- Which results are we aiming to achieve? What are measurable indicators we can expect training to change? (Level 4)
- What do staff need to do differently? (Level 3)
- What knowledge, skills, and attitudes do staff need in order to behave in that way? (Level 2)
- How do we design an attractive learning experience that produces those knowledge, skills, and attitudes? (Level 1)

Trainers should also take note of how evaluating a training will be different based on the type of skills the training is intending to teach participants. Safety trainings and how to operate equipment can be evaluated differently than a "how to react to microaggression" training.

Guidelines for evaluating Level 1, Reaction

- Decide what specifically you want to find out about the training experience
- Design a survey form that will quantify reaction from participants
- Provide the opportunity for written comments in the survey
- Immediately provide the survey to participants shortly after the training has concluded
- Encourage "honest" answers
- Describe as specifically as possible, how participant feedback will improve the next training

Evaluation Content	Leaner-Centered Questions
Program Objectives	I understood the learning objectives I was able to relate each of the learning objectives to the learning I achieved I was appropriately challenged by the material
Course Materials	I found the course materials easy to navigate

	I felt that the course materials will be essential for my success
	I felt the course materials were accessible to me
Content Relevance	I will be able to immediately apply what I learned
Facilitator Knowledge	My learning was enhanced by the knowledge of the facilitator
Facilitator Delivery	It was easy for me to get actively involved during the session
	I was comfortable with the pace of the training
	I was comfortable with the duration of the training
Facilitator Style	I was well engaged by the facilitator during the training
	I was given ample opportunity to get answers to my questions
Breaks, time	I felt the number of breaks was appropriate for the training
	I felt the duration of the breaks was appropriate for the training
	I felt like there was enough time to complete the training
Facility/environment	I found the room to be comfortable
	I was pleased with the room set-up
	I experienced minimal distractions during the training
	It was easy to access the features of the Teams/Zoom meeting
	I felt that the Teams/Zoom meeting was the appropriate platform to receive this type of training
	The facilities/online format were accessible to me

Survey example

Question: I was comfortable with the duration of the training session

Evaluation scale: "strongly disagree," "disagree," "neither disagree or agree," "agree," and "strongly agree."

We recommend that you share a screenshot version of the form instead of the link.

Key Takeaways

> ➢ Email participants the survey the day of or the following day training has ended. You can even build in time to take the survey during the allotted training time.
>
> ➢ Use the Kirkpatrick model to receive information and gather data about the level of success in your training/presentation.
>
> ➢ Build your training around the desired outcomes in the Results level before you build the actual training content.
>
> ➢ Take note of how evaluating a training will be different based on the type of skills the training is intending to teach participants (operational skills versus interpersonal skills).
>
> ➢ Review your material and ensure it aligns with the City of Portland core values and the values and/or mission statement of your bureau.
>
> ➢ Check with your bureau to see if they have a standardized approach or specific branding requirements for presentations (color and font choice).
>
> ➢ Ask for help and seek out resources of subject matter experts; that may be someone in your bureau, another bureau, or an external specialist.
>
> ➢ Be sure to have specialists review your presentation utilizing the Racial Equity Lens and other relevant best practices.

Conclusion

Eventually, we would like to see this guide adopted as a Citywide resource, because we know the public and City employees have a right to expect public events and trainings offered by the City of Portland that are consistently accessible to and inclusive of all people. If you find this guide assists you in making your trainings and/or public events more accessible and inclusive, we hope you will share it with your colleagues. Even better would be if you are able to work to have your bureau adopt this guide as an internal resource. If enough bureaus adopt and benefit from this guide, there is a greater chance it will be approved for use Citywide.

This guide was created for the benefit of all City staff who create public events and/or trainings. In the future, we expect to update this guide on at least a quarterly basis. Since we want this guide to be helpful to all of us, we would appreciate your feedback. We are open to anything you are able to contribute from praise to criticism and everything in between. But we would love ideas as to how this guide could be improved with the goal of creating more accessible and inclusive public events and trainings. To share your feedback, please contact Nathalys, Jonathan, Matthew or Lauren through the above contact information.

Thank you for engaging with this guide. We hope you find it helpful, and we wish you luck in creating more accessible, inclusive training and/or public events.

Acknowledgements

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