

PREVENTION FIRST

CHECKLIST FOR INCLUSIVE FACILITATION PRACTICES

Prevention First is committed to diversity, equity, belonging and inclusion in all aspects of our work. This commitment extends beyond policy; it is embedded in our daily practices, particularly in how we engage with one another and the clients and communities we serve.

To that end, this checklist has been developed as a practical tool to guide Prevention First staff in facilitating meetings, events, and trainings—both internally and with external partners—in ways that are intentionally inclusive, respectful, and culturally responsive. It serves as a reminder that inclusive facilitation is not just about what we present, but how we create space for dialogue, learning, and connection.

By using this checklist, staff will be better equipped to ensure that all voices are heard, that diverse perspectives are honored, and that every participant feels a genuine sense of belonging. The checklist should be followed to the best of your ability, recognizing that approaches may vary depending on each event's type, format, and purpose.

Before Training/Event		
	Checklist Item	Why this is important
<input type="checkbox"/>	Discuss any participant accommodation requests with your manager or director to ensure reasonable accommodations are met and any unmet needs are addressed. See Accommodation Request Policy and Procedures .	Supports Prevention First's commitment to diversity, equity, belonging, and inclusion.
<input type="checkbox"/>	Communicate expectations with consultants to ensure inclusivity. For consultants developing content on behalf of Prevention First, this document should be shared with the consultant, along with Consultant Development Standards .	Ensures consultants are aligned with Prevention First values.

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	Checklist Item	Why this is important
<input type="checkbox"/>	<p>Communicate expectations for camera and/or microphone accessibility and use ahead of time for virtual events. Share the READY for Training Tip Sheet as appropriate. Ensure any consultants know Prevention First's camera and/or microphone use expectations.</p> <p>For more information about camera usage recommendations, visit: Turning Off Your Camera Can Boost Mental Health NOPI Camera-ready or not! Why virtual trainers should think twice about asking learners to be on camera</p>	Provides participants with ample time to prepare for their engagement in the event. For neurodivergent individuals, being on camera can be challenging, and limited camera use can allow individuals to engage more effectively. Communicating expectations ahead of time allows a participant to request accommodations if necessary.
<input type="checkbox"/>	Send out agenda, course outline, or schedule in advance, including potential discussion questions as appropriate.	Provides participants with expectations and removes obstacles that may make people less willing to attend.
<input type="checkbox"/>	Review materials or agenda for any potential activities that may present barriers to participation. Possible barriers to learning could be physical barriers such as hearing or visual impairments, mobility restrictions, and chronic health issues. Additional barriers could include cognitive barriers or language barriers. Identify and plan for alternative options that are as barrier-free as possible, or plan to adapt the activity to provide alternative ways to engage.	<p>Aligns with Prevention First's commitment to creating an inclusive environment for all participants.</p> <p>Embedding flexibility in response, navigation, and movement is essential to reducing barriers to learning.</p>

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During Training/Event		
	Checklist Item	Why this is important
<input type="checkbox"/>	<p>Ensure that closed captions or live transcript options are turned on for virtual trainings or meetings. Additional settings to consider in Zoom include:</p> <ul style="list-style-type: none"> • Show raised hand in toolbar (separates Raise Hand reaction from others for quicker access during a meeting) • Non-verbal feedback (Allows meeting participants to communicate without interrupting by clicking on these icons (yes, no, slow down, speed up, coffee cup) • Remote support (Allow meeting host to provide 1:1 remote support to another participant) • Full transcript (Allows viewing of full transcript in the in-meeting side panel) • Save captions (Allows participants to save fully closed captions or transcripts) • Language interpretation (Allows host to assign participants as interpreters who can interpret one language into another in real-time. Hosts can assign interpreters when scheduling or during the meeting) • Sign Language interpretation view (Allows host to assign participants as sign language interpreters that can interpret one language into sign language in real-time. Hosts can assign interpreters when scheduling or during the meeting) • Sort gallery view (Allows participants to sort their gallery view order during a meeting) 	Provides support for participants who may require text while listening.

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<input type="checkbox"/>	For virtual facilitation, face your webcam when speaking and try not to have backlighting that casts your face in a shadow. Do not turn your head away from the microphone.	Lip readers can better understand your speech, and there are fewer unintentional distractions.
<input type="checkbox"/>	<p>Set and facilitate a discussion on norms/group agreements at the beginning of the event, involving participant voices in creating these agreements, as appropriate.</p> <p>If time is restricted, a modified version of the agreements and expectations should be stated. However, you should not provide a list of rules and expectations without allowing the group to provide input. Give the group a chance to discuss their needs, ask questions about the rules, or disagree.</p> <p>Examples of group agreements to ensure inclusiveness include:</p> <ul style="list-style-type: none"> • Everyone is encouraged to participate. • Balance your participation – speak and listen. • Listen to and respect other points of view. <p>For more information about group agreements, visit https://blog.rizeconsultants.com/en/intersections/shared-agreements-foster-inclusion</p>	Establishing group agreements encourages inclusion and provides safety for diverse participants. Participants who help make group agreements will likely contribute more throughout the meeting.
<input type="checkbox"/>	<p>If you are comfortable and it is permissible, share your pronouns when introducing yourself. Add pronouns next to your name in the introduction slides or next to your name in the virtual platform. Avoid the phrase “preferred” pronouns. Simply state, “My pronouns are.”</p> <ul style="list-style-type: none"> • Do not assume someone’s pronouns. Instead, use the person’s name until you know their pronouns. 	Sharing pronouns and using others’ pronouns correctly communicates values of respect and inclusion.

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During Training/Event

	Checklist Item	Why this is important
	<ul style="list-style-type: none"> • Instead of phrases like “You Guys,” “Ladies and Gentlemen,” try using words or phrases such as “guest,” “everyone,” or “you all, y’all” to refer to groups in a more inclusive way. • In virtual settings, provide an overview of Zoom or other platform tools to show where they can change their name, add pronouns, etc. <p>If you make a mistake and use the incorrect pronoun, make a brief and genuine apology. If someone corrects your pronoun usage, thank them for correcting you. Use the person’s pronouns and name correctly right away.</p> <p>Commit to correctly using the person’s pronouns for the rest of the training/meeting. Refer to Prevention First's Inclusive Language Guidance for more explanation and examples.</p>	
<input type="checkbox"/>	<p>Use the correct pronunciation of participant names. Ask for clarification of pronunciation if unsure.</p> <ul style="list-style-type: none"> • If you make a mistake and mispronounce a person’s name, make a brief and genuine apology: “I’m sorry I mispronounced that. Thank you for correcting me. Could you please repeat your name for me?” Commit to pronouncing the name correctly for the rest of the training/meeting. 	Correct pronunciation of names makes participants feel seen and respected and signals inclusion.
<input type="checkbox"/>	When providing examples, use gender-neutral names and pronouns when applicable.	Using general-neutral language makes no assumptions and includes all people.
<input type="checkbox"/>	When providing a personal example, consider whether it is relevant to the training objectives and participant experience. Invite participants to share their experiences or examples.	Understanding where you are coming from in relation to the workshop content will help you identify any biases you may have going into the workshop.

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	Checklist Item	Why this is important
<input type="checkbox"/>	Describe verbally any images, charts, or graphs that appear on slides.	Verbally describing images, charts, or graphs is helpful for participants who are unable to see them.
<input type="checkbox"/>	Acknowledge and engage the verbal participation and contributions across group memberships. If facilitators notice an imbalance of participation, they can use various tools to encourage a broader range of voices. For some examples, visit: https://www.facilitating.xyz/facilitators-can-infuse-diversity-inclusion-everything/ .	Making sure we give everyone, regardless of group membership, the same degree of attention and respect models a key principle of diversity and inclusion. It increases the chances for a more productive and engaging learning environment.
<input type="checkbox"/>	Check in with disengaged participants throughout the event via private chat or private conversation if in person. Identify any barriers to their engagement by asking them if there is anything you can do to help them participate.	Ensures commitment to Prevention First's inclusive environment and provides an opportunity to identify accessibility needs and accommodations.
<input type="checkbox"/>	Track group dynamics for common unproductive behaviors that undermine the learning goals or violate the established group norms, and respond in ways that re-establish a productive learning environment.	It is essential for facilitators to track the participant behaviors that feel disrespectful and disruptive to other participants and to respond in ways that re-establish a sense of safety, connectedness, and respect.

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During Training/Event

	Checklist Item	Why this is important
<input type="checkbox"/>	Provide learners with the final scores and the opportunity to review correct answers to all completed assessments/post-tests for all facilitator-led and online training courses.	Ensures that Prevention First creates an environment where everyone feels valued and supported in their learning journey. Knowing their scores and having the opportunity to review answers can help alleviate assessment-related anxiety and stress.

Post Training/Event

	Checklist Item	Why this is important
<input type="checkbox"/>	Invite meeting/training participants to provide comments or contributions after the event to provide opportunities for those who did not contribute to the original discussion.	Creates an opportunity for meeting participants who may not have contributed to the original discussion to contribute their comments. Ensures inclusivity and engagement for all participants.
<input type="checkbox"/>	Share meeting/training recordings and/or notes within 5-7 business days after the event, as appropriate. Please verify if this is allowable for a consultant-led training before sharing.	Ensures participants have access to the information they want or need following the training/meeting.
<input type="checkbox"/>	Evaluation. Process evaluation will begin in FY26 with training managers assessing TTA Specialists' use of inclusive engagement practice, utilizing the revised training competencies during trainer observations.	Evaluation is a core accountability component and aligns with Prevention First's CQI process.

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Post Training/Event		
	Checklist Item	Why this is important
	<ul style="list-style-type: none"> Other Prevention First staff should ask for feedback from a manager, co-worker or other peer to identify areas of strength with inclusive facilitation and areas for continued growth. 	
<input type="checkbox"/>	Evaluation. During Q3 of FY26, a survey will be sent to all Prevention First staff to evaluate how the checklist implementation is working and what refinements need to be made. A small committee will be created and meet in FY27 to discuss possible outcome evaluation measures.	Evaluation is a core accountability component and aligns with Prevention First's CQI process.
<input type="checkbox"/>	Ask for feedback from a manager, co-worker, or other peer to identify areas of strength with inclusive facilitation and areas for continued growth. Consider suggestions about encouraging increased participation and inclusion of diverse contributions, and what factors might be perceived as barriers to participation and inclusion.	Evaluation is a core accountability component and aligns with Prevention First's CQI process. Honors commitment to Prevention First's culture of feedback.

Additional Resources

[Advancing Health Equity: A Guide to Language, Narrative and Concepts](#). American Medical Association.

[Inclusive Workshop Toolkit](#). McGill University

[Inclusive Facilitation Playbook](#). Agility.ac

[Principles and Strategies for Inclusive Language in Class Environments](#). Notre Dame Learning

[Creating Inclusive Spaces. A Facilitator's Guide to Equity and Inclusion in the Classroom](#). Family and Youth Services Bureau

[How Facilitators Can Infuse Diversity and Inclusion into Everything We Do](#). Facilitating XYS

[Shared Agreements Foster Inclusion](#). Rize Consultants

[Preferred Terms for Select Population Groups and Communities](#). CDC