

# Planning a Great Meeting

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## Planning a Great Meeting

Meeting planning provides the necessary logistical support to the content of a meeting's program. The meeting organizer has a clear purpose for holding a meeting. The meeting planner must understand that purpose, and work with the meeting organizer by suggesting ways to make the meeting accessible, functional, pleasant and smoothly run. The meeting-planning process involves five main steps:

### 1) Determine what needs to be accomplished at the meeting.

- **Sketch out a mental picture of the meeting.**

- What does the organizer want the meeting to accomplish?
- Who will be invited?
- How many days will the meeting take and when should it occur?
- What budget is available?
- Are certain geographic locations more convenient for attendees or pertinent to the meeting?
- Will participants handle their own long-distance transportation?

### 2) Use your meeting goals to identify criteria for selecting a good site.

- **Match the meeting's site to its purpose.** For information exchange or other large meetings, conference centers might be the best choice because they house, congregate and feed large numbers of people in a pleasant and work-conducive environment. Think tanks and brainstorming are thought to benefit from more relaxed and unusual settings. Consider a resort only if the attendees will have a chance to use the facilities.
- **Identify features and services that potential sites will need to support the meeting, including accessibility features that meet the Americans with Disabilities Act Accessibility Guidelines (ADAAG).** Develop a site checklist *tailored to that meeting*, and use it to evaluate each facility (see *Sample Site Inspection Checklist* on pages 10 and 11).
- **For popular locations and times of the year, it may be necessary to select a site a year or more in advance.** Three to five years may be necessary in order to get the best and most accessible facility (the best facilities obviously book faster than others).
- **Conferences on topics of interest to many can result in larger than expected attendance.** (The number of attendees will affect the budget.)

### 3) Inspect potential sites *in person*.

- **Use a site inspection checklist.** Take notes at each site—memories fade when you inspect several sites (see *Sample Site Inspection Checklist* on pages 10 and 11).
- **Sleep at the facility and sample the food, if possible.** Ask to see the sleeping rooms that are designed to accommodate people with disabilities, including wheelchair-accessible rooms with and without roll-in showers.

Also ask staff to show you what features, including adaptive equipment, are available to accommodate guests who are blind, low vision, deaf or hard of hearing.

- **Visit each meeting room.** Check for adjustable lighting and test to see that sound-proofing is adequate. When possible, select meeting rooms with windows. Avoid rooms with blank walls. Are all meeting rooms accessible to people who use wheelchairs? Are they equipped with assistive listening systems for guests who are hard of hearing?
- **Confirm that accessible hotel accommodations, services and equipment are available in compliance with the Americans with Disabilities Act (ADA).** The facility staff and employees, as well as the meeting staff, should understand basic disability etiquette.
- **Verify that accessible transportation options to and from the meeting site are readily available.** The concierge for the facility should be knowledgeable about the accessibility of local attractions or should know what questions to ask of the proprietors of the attractions. The local Independent Living Center or other disability organization at the chosen location may provide helpful information (e.g., area resources, accessible restaurants), which can be included in information for attendees but should not be provided as a separate resource list.

#### 4) Negotiate the Facility Contract.

- **Try to have at least two or three hotel options.** Compare prices and use the other hotels' price quotes as leverage when negotiating with the hotel you want.
- **Negotiate complimentary guest room nights and use of special rooms.** One complimentary guest room night usually comes with a certain number of room nights booked (for example, one complimentary room night for every 50 room nights booked).
  - A complimentary hospitality suite, often worth two guest rooms, can also be negotiated.
  - Large conference rooms should be complimentary if the group is large (100 people or more) and there are meal functions. Likewise, smaller meeting rooms can often be negotiated on a sliding fee schedule.

#### 5) Pamper guests to facilitate meeting goals.

- **Good food goes a long way.** In one case, 12 program leaders worked 2,000 hours (with no pay) since they were fed a wonderful dinner the night before each meeting.
- **Have someone on site who can change travel reservations.** Attendees then can focus on the meeting's topic.

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## Meeting Format and Content

### 1) Allow enough lead time to plan the meeting.

- **Significant lead time is necessary to commission research of value and to plan a large conference.** Nine months is the minimum time needed for good results.
- **Plan and enforce earlier deadlines for research papers than you think you need.** Authors often miss submission deadlines for conference papers, leaving moderators and organizers no time to summarize or mail papers to attendees prior to the meeting. Remind authors that if they plan to distribute materials, they should bring disks of the materials in Word or text formats. They also should be prepared to deliver the materials in alternative formats such as large print, Braille and disks in various formats for attendees with disabilities who cannot use standard print formats.
- **Get permissions for any materials you intend to reproduce.**
- **If discussion is the object of the meeting, send research papers to participants one to two weeks in advance** so they have sufficient time to read them. Have plans in place to provide alternative formats upon request.
- **Produce and distribute a written conference product.** A written conference product is essential to a good dissemination effort. If you need such a product to meet your meeting objectives, plan time for its production and distribution to take place immediately after the meeting. If you want a meeting summary, hire a writer to attend the meeting and work on deadline to produce one.
- **Make or be prepared to make conference materials available in alternative formats** such as large print, Braille and disks in various formats.

### 2) Choose an effective meeting format.

- **When dealing with major issues, try to bring all the players into one room and emphasize interaction.** Those who represent one point of view can interact with others who may have different perspectives. Allow sufficient discussion time for those identified as lead participants.
- **Determine the ratio of presentation time to discussion time.** With a well-informed and sophisticated audience, minimal lecture and maximum discussion time works well. Allow equal time for presentations followed by discussion, particularly if papers can be circulated to attendees in advance. If more time is needed for discussion and socializing, limit presentations to short summaries of written papers.
- **Decide whether more time for informal small group discussions will be beneficial.**
- **Vary the meeting format.** As appropriate, use the whole audience, small groups, debates, panels, town-hall style, one-on-one consultations and skills practice.

- **Match the number of attendees to the objectives of the meeting.**
  - For decision-making, a maximum of 15.
  - For think tanks, a maximum of 30, unless attendees are broken up into smaller groups.
  - For skill building, a maximum of 20.

### 3) Choose the right speakers and chairpersons.

- **Choose speakers carefully—big audiences require a bit of theater.** Give clear guidance about what you want from the speaker and limit the time allowed (15- to 30-minute maximum for the main speaker). Rehearse or review the draft talk.
- **Limit speakers to six slides per 15 to 20 minutes.** This forces the speaker to be succinct and write the presentation before the meeting.
- **For large meetings, give speakers examples of slides in the form of templates** (see *Slide Templates* on pages 12 and 13).
- **Prepare speakers by providing guidelines for making their presentations accessible to everyone** (see **Guidelines for Accessible Presentations** on page 15).
- **To stay on schedule, time individual presentations.** Make sure speakers know in advance that someone will time each presentation and signal them when their time runs out.
- **Using co-chairs to run a conference can have both benefits and liabilities.** More than one perspective on the issue can be captured if several experts work out an agenda for the conference. If each co-chair is running a separate panel, it may be hard to manage both the length of time it takes to confirm speakers and the effectiveness of steering that panel.

### 4) Put together a realistic agenda.

- **Don't overload the agenda.** Meeting length should be geared to the activity. Draft an agenda. Then go back to the agenda; double the time for each session and cut back the items on the agenda. (See *Timing Guidelines* box at right.)
- **Experienced trainers indicate that the maximum amount of time people can focus is about five to six hours.** List times on the final agenda and try to keep to them.
- **Allow enough time for questions.** One rule of thumb is one minute of questions for each minute of presentation. Prepare discussion questions in case the group needs a kick-start.
- **Make breaks as long as possible—20 to 30 minutes.** This is where important networking takes place. Longer breaks after small group sessions let people either follow up on discussions that arose during those sessions or check in with their offices.

#### TIMING GUIDELINES

- **Brainstorming:** one to two hours per topic.
- **Progress reports:** 16 minutes per speaker.
- **Small group breakouts:** 45 to 90 minutes, depending on tasks and numbers.
- **Breaks:** 20 minutes for small groups, 30 minutes for large groups.

- **Begin think tank meetings with an evening meal or a social event so introductions take place before meetings.** Meeting time is gained the next day for the real work.
- **If facilitators are hired to answer questions or move discussions along, allow adequate time for them to organize breakout sessions and the information that is presented, in the smaller groups.**
- **Avoid a large room lecture format for an entire day.** Breakout sessions are very welcome, particularly in the afternoons. Assign the audience to breakout sessions in advance (posting assignments in conference handouts) to avoid confusion.
- **Start and end on time (and end early, if possible).**

#### 5) Keep the audience fresh.

- **Where appropriate, try different room setups each day,** especially if the group is in the same room every day. Ensure that each new setup provides accessibility such as room, lighting and dark backdrop for interpreters to be seen, tables (if there are tables), ramps and aisles that meet the ADAAG.
- **To increase interaction, set up meetings in round or cluster shapes.** Put ‘reserved’ signs on the back rows of seats to encourage attendees to sit up front.
- **Equipment can be used to enhance speakers’ impact.** (See *Audiovisual Tips* box at right).

#### 6) Evaluate the meeting.

- **Evaluation is especially helpful in planning future meetings.** Ask for suggestions for future topics and speaker ideas. Also ask for suggestions regarding the meeting format and for feedback and recommendations related to accessibility issues of the conference.
- **Allow time to fill out the evaluation forms before the end of the meeting,** otherwise people leave without completing them. If your meeting lasts for several days and/or has different components that you want to evaluate, use a separate evaluation form for each day or component. Make sure that these forms are available in alternative formats and provide options for participants who may have difficulty filling out a standard paper form, such as an electronic version and scribes.

#### AUDIOVISUAL TIPS

- **Consider using a wireless microphone** with no lectern. Not only are wireless microphones essential for individuals who use mobility devices and cannot reach the microphone, but moving targets are much more interesting than talking heads.
- **Use an adjustable lectern (if you use a lectern).** Adjustable lecterns are essential for individuals who cannot reach the microphone. If an adjustable lectern is not available, it is recommended that you do not use a lectern at all.
- **Set lecterns and projection screens at different angles** so that speakers can check their slides without turning their backs to the audience.
- **Make sure a technician is assigned to the meeting—** technical difficulties can occur even if the equipment is checked in advance using the speakers’ presentation materials.
- Make sure that presentations immediately following meals don’t call for lowered lights.
- With larger groups, make sure you have one or more remote microphones for audience questions.

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## Meeting Planning Timeline

### 1) Six to 12 months out: once you decide to have meeting

- **Determine who will attend, including local guests and VIPs.**
- **Select several possible meeting dates and sites.** Be sure to keep in mind national and local holidays, events, weather conditions and accessibility issues. For example, you might not want to have a meeting in Philadelphia at the same time as the Republican National Convention.
- **Contact hotel/conference centers and visit relevant Web sites.** For instance, *www.plansoft.com* provides virtual tours of hotels.
- **Visit potential sites.** Consider distance from airport, shuttle service and parking options, including accessible transportation options (see page 7) and accessible parking.
- **Select potential sites and, if feasible, obtain referrals.**
- **Select a destination and facility.**

### 2) Four to six months out

- **Inform potential attendees of the meeting's date and location via brochure, letter or e-mail. Announcements and registration forms should advise individuals to self-identify any special needs in advance, including but not limited to dietary needs, food allergies and whether accommodations need to be made in the conference materials.**
- **Refine the program/agenda.**
- **Confirm speakers:** Send letter of confirmation with agenda, guidelines for preparing presentations, and presenter's agreement form. Obtain presenter bio sketches.
- **Negotiate and sign facility contracts.** The more information you have, the easier it is to negotiate. Make sure to include a requirement that the contractor must meet the ADA guidelines for facility accessibility.
- **Contract with a hotel.**
  - Verify that sleeping room requirements and room types are defined.
  - Verify that accessible rooms and other accessibility features, such as TTYs, flashing signal lights, roll-in showers, shower benches, signage and step stools, are defined and reserved in the conference room block, which should include both smoking and nonsmoking rooms as well as rooms with different bed types.
  - Ask whether the facility will honor the daily rate for the nearest weekend and the number of attendees who can be accommodated.
  - Meeting room requirements should be spelled out in the contract on a day-by-day basis, including accessibility features for guests with disabilities.
  - Identify taxes and service charges within the contract.
  - Confirm and negotiate room rate, meeting room rental and complimentary sleeping rooms.
  - Review cancellation and attrition clauses.

- Obtain disclosure of any work being performed on the facility that could affect the meeting.
- Know how many rooms/what food and beverage requirements for meals, receptions and breaks.
- Audiovisual requirements should be in the contract: Consider your needs relative to taping or transcribing the meeting and whether an on-site audiovisual technician is required.
- Determine and arrange for on-site office and communications needs, including an Internet provider.
- Inquire about accessibility features and services that the hotel offers guests with disabilities.

### 3) Three months out

- **Plan and arrange for local transportation needs:** who will meet and greet where; shuttles from the airport and train stations; parking at the meeting facility; accessible transportation options, including public mass transit systems (light rail systems or elevated rail, buses, etc.) which are generally now accessible, private taxi services (generally not accessible), and paratransit services (often people who qualify in their cities can transfer eligibility temporarily to another city for the conference period).
- **Check whether there are any attendees with disabilities** who will need extra assistance.
- **Arrange accessible services, as needed, for presenters and attendees** including interpreters, audio loops, captioning and Communication Access Realtime Translation (CART).

### 4) Two months out

- **Determine the way each meeting room should be set up.** Choose configurations appropriate to the activity and size of the meeting. To be safe, fax your set-up diagram to the hotel. (See *Meeting Room Configurations* box at right.) Factor in extra space for attendees or participants with disabilities, wheelchairs or other mobility devices, guide dogs, interpreters and other service providers.
- **Order the necessary signage** to help the meeting run smoothly, such as welcome banners, podiums signs, directional signs, message boards and meal signs.
- **Send attendees information about the meeting,** including participation requirements and information about the hotel/conference facility. Registration forms should have a due date one month before the meeting.

### 5) One month out

- **Send rooming list to hotel.** When reservations are made directly with the hotel, make sure correspondence goes out to participants, clearly noting that they are responsible for making their own reservations and the date by which

#### MEETING ROOM CONFIGURATIONS

- **Theatre style:** recommended only if attendees do not need to take notes.
- **Classroom style:** good for large meetings.
- **Hollow square:** does not support AV and accommodates only 20 to 40 people well.
- **Conference style:** commonly used for board meetings and effective for up to 20 people.
- **U-shaped:** recommended for workshops of fewer than 45 people.
- **Clusters or rounds:** support group discussion.



that must be done. Include a statement that accessible rooms are limited and those who require accessible rooms should make their reservations early. Send a second reminder if time allows.

- **Find out from attendees and presenters what accommodations they need to participate.** These include wheelchair access, interpreter, open captioning, large print, Braille, disk (specifically what format), audiocassette and note taker.
- **Confirm attendee billing with the hotel:** Identify who is on master bill (always includes staff and presenters without grants) and who is self-paying.
- **Finalize food and beverage requirements.**
- **Find out from speakers what audiovisual aids they need.**
- **Finalize room setups and audiovisual needs.**
- **Obtain names, phone numbers and pager numbers of all key hotel staff.**
- **Order attendee materials** such as name badges, notepads and other amenities.

#### 6) Two weeks out

- **Prepare name badges and tent cards for all attendees.**
- **Prepare bio cards for presenter introductions.**
- **Prepare a meeting kit to take with you.** It should include a first aid kit, flashlight, measuring tape, screwdriver, laser pointer, spray adhesive, box cutter, file folder of premade signs, markers and other office supplies.
- **Ship materials to the facility.** Label materials identically and confirm their receipt with the facility.
- **Go over the hotel contract making certain all information is correct.** Look for hidden costs. Confirm that the audiovisual equipment ordered is available.
- **Supply helpful information in advance of meeting.** (See *Send Materials to Attendees in Advance* box at left.)
- **Ensure that journal and publication articles have copyright clearance:** Fax request to the journal's publishing company; obtain and mail copyright clearance checks two weeks prior to meeting.
- **Obtain presenter materials** for distribution.

#### **SEND MATERIALS TO ATTENDEES IN ADVANCE**

- **The final agenda,** objectives of the meeting, and a list of participants.
- **Logistics sheet that includes facility name, address and telephone numbers,** including how people can contact attendees.
- **Driving directions.**
- **Reimbursement guidelines.**

#### 7) Three days out

- **Provide the hotel with food and beverage guarantees.** Guarantee about 15 percent under the anticipated attendance.

- **Confirm information about the meeting events to be posted on directional signs in the hotel lobby and hallways.**
- **Confirm with the facility the needs of guests with disabilities (if any).**
- **Contact the speakers to make sure their audiovisual requirements have not changed.** Make any adjustments necessary.
- **Review the rooming list and confirm that all participants have pre-registered.**
- **Inspect VIP rooms,** the accessible rooms and other accessible equipment such as the kits they may have for hard of hearing and deaf guests.
- **Coordinate the “meet and greet” activities and ground transportation for incoming travelers.**

#### 8) **On site the day of the meeting**

- **Reconfirm all requirements.** A pre-conference meeting is strongly recommended.
- **Check all meeting room setups and temperature control mechanisms.**
- **Check and test all AV equipment.**
- **Set up a registration desk,** if appropriate.
- **Review billing each day for accuracy.**
- **Review the “sleeping room pick up”—whether all rooms booked have been claimed by attendees.** Find out if hotel is sold out; it could help with any attrition costs (See *Glossary of Meeting Terms* on page 14).
- **Inform the hotel or conference facility of all changes in the agenda.**

#### 9) **Post-meeting follow-up**

- **Review Evaluation forms.**
- **Send thank you letters to presenters with copy of session evaluation results.**
- **Review and ensure payment of bill and reimbursement to presenters, etc.**

## SAMPLE CONFERENCE SITE INSPECTION CHECKLIST

Site \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_ Salesperson \_\_\_\_\_

Rates for a single \_\_\_\_\_ double \_\_\_\_\_ Phone \_\_\_\_\_

Complimentary room rate \_\_\_\_\_ Dates discussed \_\_\_\_\_

### First Impressions

Lobby décor (describe first impression the site gives you) \_\_\_\_\_

Entrance: Is the front entrance accessible? \_\_\_\_\_

Front desk staff: Friendly yes / no    Efficient yes / no    Knowledgeable and comfortable serving guests with disabilities yes / no

Helpfulness of salesperson \_\_\_\_\_

### Meeting Support

Types of meeting rooms available (describe)

Plenary space \_\_\_\_\_

Break-out space \_\_\_\_\_

Number of elevators that serve the levels where the meeting will be held \_\_\_\_\_

Accessible meeting room, including assistive listening systems \_\_\_\_\_

Other \_\_\_\_\_

Meeting room décor (describe) \_\_\_\_\_

	Room #1	Room #2	Room #3
Windows	yes / no	yes / no	yes / no
Adjustable lighting	yes / no	yes / no	yes / no
Sound-proof	yes / no	yes / no	yes / no
Cost of room	_____	_____	_____

### Technical Support

AV staff in-house yes / no

AV costs VCR \_\_\_\_\_

Microphone \_\_\_\_\_

Projector \_\_\_\_\_

(For small locations, can hotel's electrical system handle the lighting and video needs?)

## SAMPLE CONFERENCE SITE INSPECTION CHECKLIST (continued)

### Guest Rooms, Amenities and Other Features

Sleeping room décor (describe) \_\_\_\_\_

Cost per room night \_\_\_\_\_

Amenities (coffee maker, toiletries, free local calls, other) \_\_\_\_\_

Wheelchair accessible rooms (including roll-in showers) yes / no

TTYs yes / no

Alert lights yes / no

Fitness facilities /cost \_\_\_\_\_

Airport transportation \_\_\_\_\_

Toll-free reservation line yes / no Room reservation service yes / no

Hotel renovations (list all) \_\_\_\_\_

### Food and Beverages

Meal(s) sampled:  breakfast  lunch  dinner

Meal quality:  excellent  good  mediocre  poor

Special meals (diabetic, low fat, vegetarian, etc.)

Meal cost: breakfast \_\_\_\_\_

lunch \_\_\_\_\_

dinner \_\_\_\_\_

meeting refreshments \_\_\_\_\_

### ADA Compatibility

What equipment does the hotel have on its site? \_\_\_\_\_

Accessible restrooms yes / no

Accessible telephones yes / no

Accessible parking and/or valet parking yes / no

Accessible restaurants (including Braille and large-print menus) yes / no

Accessible transportation yes / no

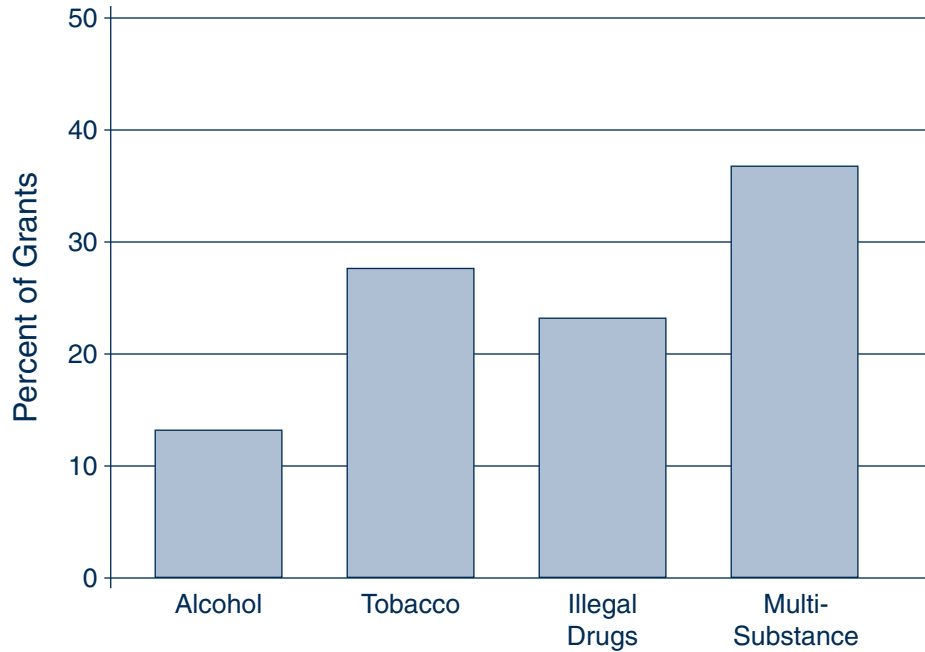
# Title Text

(Suggested fonts: Times New Roman or Arial  
Suggested font size range: 36 to 44 point)

- Bulleted items
- Suggested fonts: Times New Roman or Arial
- Font size range: 28 to 32 point
- Maximum number of lines per slide: eight for 28-point; six for 32-point

# Title Text

(Suggested fonts: Times New Roman or Arial  
Suggested font size range: 36 to 44 point)



(X & Y axis labels suggested font size: 18 point)

## GLOSSARY OF MEETING TERMS

<b>attrition costs</b>	An expense that occurs when the actual number of rooms to be occupied falls below the original number blocked in the signed contract. On a predetermined date, a certain percentage of the original block can be canceled without charge.
<b>breakout rooms</b>	Small meeting rooms used in addition to the larger general session room, suitable for specialized training and problem solving.
<b>cancellation policy</b>	If a meeting is canceled after the contract is signed and after a designated date, the hotel has the right to charge a substantial penalty to recoup their loss of revenue.
<b>day rate</b>	The flat rate charged by the hotel or conference facility for guests who attend the full day but do not use sleeping rooms.
<b>event order</b>	An outline of the entire meeting plan, including guaranteed number of attendees, times, locations, menus, room setups and orders for audiovisual aids.
<b>guarantee</b>	To ensure that the facility has enough food for the meals planned, a final attendee count is given—or guaranteed—to the hotel 72 hours in advance.
<b>individual pay own</b>	“IPO” on a rooming list informs the hotel that the attendee will pay for his or her room, tax and incidentals.
<b>no-show charge</b>	The cost of a room charged to the meeting master bill if an attendee does not arrive and or cancels the room reservation.
<b>pre-con</b>	A meeting prior to attendees’ arrival that is held by the meeting planner and the key hotel personnel.
<b>transfers</b>	Pre-arranged private transportation that will take attendees between the airport and hotel.

## GUIDELINES FOR ACCESSIBLE PRESENTATIONS

The following guidelines are basic pointers for delivering presentations that are accessible to all participants of your meeting, including participants with disabilities.

- Make sure there is sufficient lighting around presentation area to see presenters and interpreters.
- If using slides or Microsoft PowerPoint, make sure to read everything that is on the screen and describe all images to fully include guests who are blind or who have low vision. For people with visual impairments, overhead and Microsoft PowerPoint slides are best viewed if they are created with a solid background, preferably light-colored text on a dark-colored background.
- Provide copies of slides or Microsoft PowerPoint presentations to fully include guests who are unable to take notes or who have cognitive disabilities.
- If showing media (videos, for instance), bring captioned versions. If only available in closed-captioned, make sure there is a decoder available. If possible, have any videos audio-described as well as open-captioned to fully include guests who are blind or who have low vision.
- Do not block your lips with your hands or papers when speaking, as this will obstruct view from those reading lips.
- Prepare large print materials in 18-point font, bold, plain style with one-inch margins. Avoid lettering using all capital letters which is difficult to read. Use lightly colored paper rather than white which produces less glare when using a magnification device.
- In addition to large print materials, Braille copies, audiotape versions and accessible electronic formats (such as Microsoft Word or text) should be available on site. For large “take home” documents, offer to take names and mail the document following the meeting. In addition, note that WebAIM offers tips for posting Microsoft PowerPoint slides on Web sites so that they are accessible:

*<http://www.webaim.org/howto/powerpoint>*

### Additional Resources

“Arranging Accessible Meetings” is a bulletin published by the Rehabilitation Engineering and Assistive Technology Society of North America (RENSA) Technical Assistance Project. *<http://www.resna.org/tap/tapbull/tapaug.htm>*

“A Guide to Planning Accessible Meetings” is a booklet developed by an international expert on accessibility, and is considered an excellent resource for accessibility to meetings. It is published by ILRU, 2323 S. Shepherd, Suite 1000, Houston, TX 77019, at \$25 per copy. To order a copy, call (713) 520-0232.

“Making Your Presentations and Material Accessible” was highlighted in the Fall 2000 newsletter of the AXIS Center. *[http://www.axiscenter.org/Newsletter/Fall2000/Planning Accessible Meetings Part III.html](http://www.axiscenter.org/Newsletter/Fall2000/Planning%20Accessible%20Meetings%20Part%20III.html)*



The Guidelines for Accessible Presentations and review of the entire document have been provided by:

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