DIVERSITY, EQUITY, AND INCLUSION

LEARNINGS & NEXT STEPS



AN OPENCON REPORT ON CONFERENCE PLANNING

VERSION 1 - RELEASED JULY 10, 2017







OPENCON

OpenCon is a platform for creating, empowering, and connecting the next generation of leaders to advance Open Access, Open Education and Open Data—across disciplines, and in every corner of the globe. OpenCon's initiatives include an annual flagship global conference, satellite events organized by volunteer hosts around the world, and an ongoing online community. Each year, OpenCon's global conference convenes promising students and early career academic professionals from around the world interested in opening research and education. OpenCon is a project of SPARC (the Scholarly Publishing and Academic Resources Coalition) and its student program, the Right to Research Coalition.

WHY BUILD DIVERISTY, EQUITY & INCLUSION INTO CONFERENCES?

People come from different contexts and circumstances. This means that on a structural level, some individuals will consistently have fewer barriers preventing them from participating and speaking at events like conferences—and some individuals will have significantly more. These systemic barriers are often a function of geographical and racial background, class, gender, and ability. The barriers themselves could be financial, physical, geographical, or social.

How can organizers design a conference that takes these and other factors into account? How can we all be more thoughtful about barriers that could prevent people from participating? How do we design an event that minimizes those barriers—one that people from a diversity of contexts and experiences can participate in? This requires attention at every stage of planning a conference—which we try to cover in this report.

The report goes over decisions around what kind of venue you are choosing, how to minimize financial barriers, how to ensure that voices which are often neglected in mainstream conversations are heard and centered, and more, based both on lessons learned from planning OpenCon over the years, as well as external resources on accessible event planning.

DIVERSITY, EQUITY AND INCLUSION 101

DIVERSITY

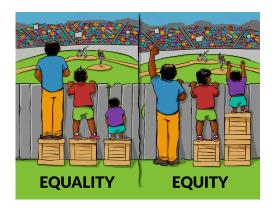
Diversity refers to having a range of people across gender identities, racial backgrounds, geographic locations, socioeconomic backgrounds, ages, ability, sexual orientation, and other characteristics represented and participating in a space, event, or community. Although diversity has a lot to do with who's in the (sometimes metaphorical) room—it's more than that. A diverse community also considers whether people from a wide range of backgrounds can meaningfully engage



at all levels of the community. This means diversity also has to do with whose perspectives are being heard, who gets to make decisions, and more.

EQUITY

Equity is another word for fairness. Equity is an approach that recognizes that the magnitude of systemic barriers posed to a particular person will vary based on their gender identity, race, geographic location, class, age, ability, sexual orientation and other factors. Equity recognizes that different people will need different amounts of resources or support in order to succeed and overcome these barriers. It is important to note that equity is different than equality, because equality-based approaches assume that everyone should be treated the same. Unlike equity, equality ignores the fact that different people begin with different resources and barriers, and therefore will need more or less support as a result.



Equality vs. Equity - Interaction Institute for Social Change & Angus Maguir: interactioninstitute.org / madewithangus.com.

In the Equality vs. Equity image, the fence represents a systemic barrier. An equality-based solution would treat everyone the same, despite the fact that the people in the image are clearly different and need different degrees of support to overcome the barrier. An equity-based solution recognizes these differences and provides an appropriate degree of support to each person based off what they need.

INCLUSION

Inclusion takes diversity one step further. When we talk about diversity, we are talking about having a wide range of voices and perspectives present and participating. When we talk about inclusivity, we are talking about communities, spaces, events, or solutions that are designed to be for people from a wide range of backgrounds. This means a space can be diverse, but not inclusive; you can have people from different backgrounds at an event, but do they feel welcome? Are you forcing them to adapt to a space that isn't built for them? Designing an inclusive event translates to everything from physical space (are people using wheelchairs able to enter the venue you've chosen?) to workshop content (do your workshop materials assume that all participants will be coming from a similar social, cultural, or racial context?)





DIVERSITY, EQUITY, AND INCLUSION AT OPENCON

Central to advancing Open Access, Open Education, and Open Data is the belief that information should be shared in an equitable and accessible way. It is important to us that OpenCon reflects these values both in our communities and in the design of our conference. We recognize that although the Open movements are global in nature, privileged voices—those from higher income countries, wealthy institutions, and those who experience systemic advantages based on factors such as (but not limited to) race, gender identity, class, and ability—are typically prioritized in conferences. Openness in research and education often embraces rhetoric around breaking down barriers to access—but how can we practice this in our work and gatherings? How can we minimize barriers to access not only to academic materials, but also to participation in our own communities and conversations?

To create an environment that minimizes replicating power structures that exist in society, OpenCon does its best to design a meeting that:

- (1) is accessible and inclusive,
- (2) meaningfully engages diverse perspectives,
- (3) centers conversations around equity.

THE REPORT

Alhough OpenCon participants come from diverse geographical locations, over the years we have learned that inclusion means more than simply having diverse representation in the room. Both as a conference and global community, we continue to work on making OpenCon a more inclusive space. We are constantly learning. This report was created to:

- Keep OpenCon transparent and accountable to our commitments to diversity, equity, and inclusion
- Share our learnings as conference organizers and encourage others to organize events that center on diversity, equity, and inclusion
- Encourage iteration and feedback from the broader community

Although we encourage this report to be used as a resource for other organizers, we understand that many of the practices and accessibility requirements we mention: (1) are not exhaustive, (2) may not be possible depending on the infrastructure or financial resources available to organizers, and (3) may not be appropriate in all geographical and cultural contexts (the authors of the report are Northern American and European). In this way, the report is not meant to be a set of firm rules. Rather, we hope it will help organizers to be more thoughtful about integrating these values at every step of the conference planning process within their resources and means.

WHAT'S IN THIS REPORT?

Lessons Learned on Planning an Inclusive Conference	6
We outline practices we have incorporated into our conference planning	
so far, as well as areas that we will improve in the future.	
Conference Checklist	28
Drawing both from our own practices and public resources on inclusive	
and accessible event planning, we have created a standard checklist of	
actions conference organizers can take when planning events, workshops	
, and conferences.	
OpenCon Self Assessment: 2014-2016	33
We share figures illustrating OpenCon's global conference demographics	
from 2014 to 2016, indicating areas of improvement over our three-year	
history and areas that still need work.	

LESSONS LEARNED ON PLANNING AN INCLUSIVE CONFERENCE

- 1. Diversity of Organizing Committee, Speakers, and Participants
- 2. Programming Choices that Center Diversity, Equity, and Inclusion
- 3. Participant-Driven Programming
- 4. Ensuring your Venue is Accessible and Inclusive
- 5. Ensuring that Conference Media is Accessible
- 6. Ensuring that Opportunities to Engage with the meeting are accessible and Inclusive
- 7. Enforcing a Code of Conduct
- 8. Additional Considerations



DIVERSITY OF ORGANIZING COMMITTEE, SPEAKERS, & PARTICIPANTS

WHO IS PLANNING THE MEETING?

WHO IS COMING TO THE MEETING?

ARE YOU MINIMIZING BARRIERS TO ATTEND?

WHOSE VOICES GET HEARD-WHICH PERSPECTIVES ARE MOST VISIBLE?

ORGANIZING COMMITTEE

We strongly encourage conference organizers to utilize a representative organizing committee in planning a meeting to provide feedback and guidance to conference organizers throughout the planning process. The specific activities and level of involvement of the organizing committee will depend on the conference. At OpenCon, for example, the organizing committee convenes via conference call on a monthly basis, and is consulted on key decisions such as: the application process, attendee selection, speakers, and session topics.

The makeup of an organizing committee reflects itself in the design of a conference. We recognize the need to select an OpenCon Organizing Committee that is as diverse as the meeting in geography, racial background, and gender identity. This ensures that different geographical, cultural, and social perspectives are integrated into the planning process—rather than relying on the perspective of just one individual or organization.

PARTICIPANT DIVERSITY

We recognize that although the Open movements are global in nature, privileged voices tend to be overrepresented at conferences because of access to travel funding and other means, while underrepresented perspectives are overlooked—or absent altogether—from the conversation. Each year, the OpenCon Organizing Committee does its best to invite a balance of attendees across geography, racial background, and gender identity, as well as minimizing financial barriers to attending the meeting. To assess how diverse their event is, conference organizers can include a demographic section in their registration form that collects information about gender identity, racial background, and region. When collecting information on participant gender identity and racial background, we recommend giving people the option to specify their own category (if it wasn't included as one of the options) and to opt out of answering the question (e.g. "prefer not to say"). Avoid using terms like "other".

ALLOCATION OF SCHOLARSHIPS

To minimize barriers to attending OpenCon for those outside the region where Open-Con is held (Northern America in 2014 and 2016, Europe in 2015 and 2017), we ask that speakers and attendees who have the financial means to fund their own travel to do so, in order to provide more funding for those who cannot. For instance, a large portion of general scholarship funds in 2016 were allocated to those residing outside of Northern America and Europe. Applicants are also asked to indicate in their application if they are able to self-fund their travel and registration costs.

BOOKING TRAVEL FOR SCHOLARSHIP RECIPIENTS

Asking scholarship recipients to pay for the cost of flights or travel upfront (which can often be over \$1,000 USD) can create a significant financial and personal burden. Even if reimbursement is certain, having to find funds to use—even temporarily—can create a very stressful situation for the recipient and deter potential scholarship applicants from applying altogether.

To ensure that OpenCon is as accessible as possible, we book travel on behalf of all of our travel scholarship recipients. Working with a travel agent, each booking costs \$50/ person, and we believe this process provides a net decrease in overall travel cost, as we're able to more closely control the travel expenses incurred.

SPEAKER DIVERSITY

Meaningful diversity extends beyond who is in the room. The organizing committee must ask themselves: Who is on stage? Which perspectives are given a platform? Do people whose perspectives are often neglected by mainstream work get a chance to participate and present their work? Who is granted the most visibility? Are new voices prioritized?

Advancements in open research and education are led by advocates across vast geographical contexts. To ensure that different perspectives are shared, we believe it is important to select a diverse set of speakers to share their perspectives at OpenCon. Speaker gender, racial and geographic background is considered both when inviting panelists and speakers, as well as when reviewing submitted project presentation proposals. We encourage conference organizers to be mindful about speaker diversity at all stages of the agenda planning process; and not simply as an afterthought to hit a diversity 'quota'. We also encourage conference organizers to be careful about 'tokenizing' voices (for example, having one person of color on the program or panel to speak on behalf of all people of color, or to cross off having "diverse speakers" on a checklist).

PROGRAMMING CHOICES THAT CENTER DIVERSITY, EQUITY & INCLUSION

ARE YOU MAKING SPACE FOR CONVERSATIONS ABOUT EQUITY AND DIVERSITY TO OCCUR?

ARE YOU INCLUDING PROGRAMMING THAT EXPLICITLY ADDRESSES DIVERSITY IN THE COMMUNITY, ISSUE AREA, OR DISCIPLINE?

Intersectionality: A framework first described by Kimberlé Williams Crenshaw, referring to how an individual will have overlapping social identities (gender identity, race, class, sexuality, ability, etc...) that intersect in how they contribute to an individual's experience of oppression. Definition adapted from Geek Feminism wiki: http://bit.ly/OCgkfem

PRE-CONFERENCE WEBCAST

In 2016, we introduced a webcast on diversity, equity, and inclusion as a required part of pre-conference preparation for all global meeting attendees. The 1-hour webcast provided OpenCon community members with an introduction to equity, diversity, and inclusion as they apply to the open research & education space. We chose to include multiple speakers, rather than just one presenter, acknowledging that discussions of diversity must be intersectional* in nature. The speakers reflected the diversity of identities and topics covered, across: ability, gender identity, sexuality, race and ethnic background.

EQUITY & OPEN PANEL DISCUSSION

Webcast speakers also participated in a panel discussion on Open and Equity during the main conference. The Open & Equity panel was one of four plenary panel discussions, emphasizing that a discussion about equity and inclusion is as central to the OpenCon community as those about research evaluation, culture change, and participant projects.

This ethos was reiterated during the panel itself, where panelists spoke about how equity was relevant to all discussions that happen at OpenCon. Panelists spoke about the need to de-center Western ways of knowing; the institutional policies that create and maintain systemic disparities for scholars in underrepresented and marginalized groups; the physical and invisible barriers that exist to participating in Open scholarship, and the need to consider language and accessibility in OpenCon's conference design if we are going to call OpenCon an inclusive, diverse, and global community.

OPEN REACTIONS

To create space for discussions about diversity, equity and inclusion outside of the panel discussion, there was also an impromptu session for "Open Reactions"—a platform to speak and react candidly to issues around these topics that had come up earlier during the day. If this is something you choose to incorporate into your conference, ensure that this is a facilitated discussion. We encourage you also to be mindful about who you are choosing as a facilitator. This type of session works best when led by someone familiar with equity issues and has previous facilitation experience. The facilitator should be someone who is comfortable asking attendees to step outside their comfort zone, challenge their assumptions and internalized biases, while creating a safer space for folks at the margins.

3

PARTICIPANT DRIVEN PROGRAMMING

DO PARTICIPANTS GET A SAY IN WHAT THE CONFERENCE LOOKS LIKE?

ARE THE NEEDS, INTERESTS, AND WORK OF ATTENDEES INCLUDED THE CONFERENCE AGENDA?

To make sure we are listening to a diversity of perspectives, much of OpenCon's programming is driven by—and centered around—highlighting the needs, interests, and work of attendees.

UNCONFERENCE

The Unconference is a part of the meeting in which participants are able to control content and sessions. Participants get to propose, vote on, and run sessions themselves. This enables peer-to-peer learning, collaboration, and diverse session types and topics. Rather than content being exclusively dictated in a top-down fashion from the Organizing Committee, unconference sessions allow for a more participatory conference design that puts the needs and interests of participants at the center.

STORY CIRCLES

The passionate people that work on advancing open research and education are at the heart of the OpenCon community. Our community members come to work on advancing Open with widely different backstories. In 2016, we gave participants the time and space to hear about each other's experiences, foster deeper connections with and empathy for one another, and build community through Story Circles.

Participants broke up into small groups (no larger than seven people). Each person was then given the chance to tell their life story in eight minutes—from when they were born to how and why they got to where they are today. The Story Circle session was one of the most highly rated parts of the 2016 meeting, and we would encourage other conferences to consider adopting a similar model.

PROJECT PRESENTATIONS

We want OpenCon to be a platform for students and early career academic professionals to showcase their work. Each year, we invite participants to submit proposals for short two-minute presentations about their current work. In 2016, we were inspired by exciting projects and initiatives advancing Open from over twenty participants. We aim to select presenters across Open issue areas (Open Access, Open Education, and Open Data) and geographical regions. As we describe in greater detail on page 39, assessing shortcomings in speaker diversity in past years motivated us to be more intentional about increasing the diversity/gender balance in participant project presentations.

Preparing for an Unconference Access a guide to designing an unconference at your event here: http://bit.ly/OCunconf

Story of Self Sessions
Access a guide to facilitating a story circle at your event here: http://bit.ly/OCstories

ENSURING YOUR VENUE IS ACCESSIBLE & INCLUSIVE

DOES THE BUILDING HAVE ACCESSIBLE EXTERIOR AND INTERIOR FEATURES?

IS THE VENUE EQUIPPED WITH A MICROPHONE SOUND SYSTEM?

ARE THERE GENDER-NEUTRAL BATHROOMS?

DO YOU HAVE APPROPRIATE ROOMS TO ADDRESS DIVERSE NEEDS?

CHOOSING AN ACCESSIBLE VENUE

There are a number of interior and exterior features to a building which will influence the degree to which it is accessible: Are there ramps and elevator access? Do any stairs have handrails? Are doors easy to open? Is it a wheelchair accessible space with wheelchair accessible bathrooms? For a great checklist of interior and exterior building features to look out for, see pages 3-5 of the Planning Accessible Meetings and Events Toolkit from the American Bar Association: http://www.americanbar.org/content/dam/aba/administrative/mental_physical_disability/Accessible_Meetings_Toolkit.authcheckdam.pdf

COMMUNICATING VENUE ACCESSIBILITY

Explicit information about building accessibility should be made available to attendees before they arrive to the conference. While we have not done this in past conference years, in the future, we will provide detailed information on both the webpage and pre-conference communications about the accessibility of the venue (e.g. is it wheelchair accessible? Are there accessible bathrooms/toilets in the venue building? If there are stairs, how many are there?)

VENUE SOUND SYSTEM

Make sure that your conference venue is equipped with a microphone sound system so that all participants can hear what the speakers are saying. If possible, choose a venue that can accommodate wireless microphones for use during audience Q&A.

GENDER NEUTRAL BATHROOMS

Make sure that gender neutral bathrooms are easily accessible in the building(s) where the conference is being held. Gender neutral bathrooms are bathrooms that anyone can use, regardless of gender identity. Unlike male/female bathrooms, which exclude transgender people and those who identify outside the gender binary, gender neutral bathrooms are inclusive of all gender identities.

ROOMS FOR DIVERSE NEEDS

Prayer Room: Some faiths require prayer at different points of the day. To accommodate this, it's important to make a quiet room available for those who need to pray to do so. We tell participants in advance that this room will be available in conference communications.

Quiet Room: Ensure that a room is also made available where anyone who needs a quiet space away from main conference can retreat.

Maternity Room: Some conference attendees may be nursing mothers. Participants should be told in advance that a room will be made available where mothers could nurse or pump in private, if desired.

ENSURING THAT CONFERENCE MEDIA & CONTENT IS ACCESSIBLE

ARE PEOPLE ABLE TO SEE AND HEAR PRESENTATIONS?

ARE THERE ALTERNATIVE WAYS TO VIEW/ACCESS THE CONFERENCE MATERIAL?

MICROPHONE USE

Ensure that all speakers are using a microphone when presenting—even if it seems that a microphone is not necessary. During the audience Q&A after presentations and panel discussions, we also specify that all audience members must ask their questions with a microphone so everyone can hear them. If a microphone is not available for audience members, we ask that the speaker repeat the question into the microphone so that all audience members can hear.

REMOTE ACCESS: LIVESTREAM

A high quality live webcast is made available on our website, enabling attendees to watch sessions in real time. All talks and presentations can also be streamed after the meeting is over on the R2RC Youtube Account. Livestreams, if you have a stable internet connection, can be free and easy to set up. We recognize that streaming is not always possible, especially for those without stable internet connections. This is an area where OpenCon is exploring ideas to expand accessibility, including the possibility of setting up a dropbox with lower-resolution files that can be more easily downloaded and viewed offline asynchronously.

NOTETAKING

Ensure that there are notes being taken during workshops and talks, and that these notes are publicly accessible after the meeting, as well. At past OpenCon meetings, session notes have been crowd sourced by participants, but to better accommodate participants who are hard of hearing, at future meetings it would be worthwhile to consider assigning a team of official volunteer notetakers to ensure adequate and thorough notes are taken for each session.

PRESENTER SLIDES

All OpenCon speaker slides are made available on SlideShare after the meeting. We ask that all speakers include a CC-BY license on their slides before we share them. In the future, we will also send presenters a list of guidelines for designing slideshow presentations (e.g. using sufficiently large font sizes, slides with adequate color contrast, and easy to read fonts).

CLOSED CAPTIONED MEDIA

To be more inclusive to those with hearing impairments and those with English as a second language, closed captioning for OpenCon pre-conference webcasts, OpenCon Live, and videos made available online afterward would minimize barriers to engaging in the meeting for both remote and in-person participants. This is not something we currently do, but it is something that has been noted by community members and that we hope to implement on in future years.

Setting up a Livestream We've created a how-to guide for broadcast your event live here: http://bit.ly/OClivestrm

Designing Accessible Slides W3 Web Accessibility Initiative's guidelines for making accessible presentations can be found at: http://bit.ly/w3slides

6

ENSURING THAT OPPORTUNITIES TO ENGAGE WITH THE MEETING ARE ACCESSIBLE AND INCLUSIVE

WHICH PARTICIPANTS ARE GIVEN THE OPPORTUNITY TO ASK QUESTIONS?

IS THERE MORE THAN ONE WAY TO PARTICIPATE IN CONFERENCE CONVERSATIONS?

CAN PARTICIPANTS ENGAGE IN THE CONFERENCE REMOTELY, OR ONLINE?

Q&A FACILITATION

We require that whoever is facilitating the Q&A be cognizant of who is requesting to ask questions. We believe the voices represented in the Q&A discussion should reflect the diversity of the participants, and trying to achieve this means active intervention from facilitators and moderators. Facilitators prioritize questions from those who haven't yet had a chance to speak, and those from underrepresented groups (women, people of color, people from outside higher income countries). We actively discuss and coordinate this approach with moderators in advance.

For this reason, we would strongly recommend that conference organizers use wireless microphones (or another method that allows the moderator to decide who asks the next question) if at all possible, rather than placing microphones at the front of the room. Using a first come-first serve basis for asking question privileges the most confident voices in the room, and important reactions often come from those who might take a few moments to collect their thoughts or find their voice.

For future OpenCon events, we would also like to take into account that not everyone is comfortable asking questions publicly. This doesn't mean they don't have insightful questions to ask. We are committed to offering alternative, anonymous mediums for submitting questions to speakers and panelists (e.g. through an anonymous online submission form).

LANGUAGE

Most of OpenCon's sessions and activities are held in English. However, for many international attendees, English is not their first language. It takes a lot of energy to navigate a conference in a second language, and we encourage conference organizers to thank participants who are doing so. Additionally, while it may not be feasible to hold a multilingual conference, as organizers we can still be thoughtful about how to design a conference that is accessible and engaging for English as a second language (ESL) speakers. In past years, unconference sessions at OpenCon have allowed participants to convene with others from their region and host session in their first language (for more on unconferences, see page 13). Given the global nature of our conference, we are committed to taking additional measures for accommodating ESL speakers in future years, including:

- Asking speakers and project presenters to submit summaries and slides in advance of the
 meeting. These can be made available online so remote and in-person attendees can more
 easily follow talks and presentations.
- Recruiting volunteer translators to translate online notes and speaker summaries.

REMOTE ENGAGEMENT

Last year, over 10,000 people from around the world applied to OpenCon. Unfortunately, due to logistical and financial constraints, the global meeting only has capacity for just over 200 participants. To make the meeting more inclusive, we do our best to encourage people to participate in OpenCon Live, which allows remote, online participation in OpenCon. To make this experience as engaging as possible, we had a member of the OpenCon community act as a "host" and liaise between remote participants and those at the global meeting. In addition to live streaming, remote participation in OpenCon includes:

Remote Q&A: We make an effort to include virtual participants during Q&A sessions. Questions are taken over Twitter (as well as the OpenCon WhatsApp group), and a member of the Organizing Committee is responsible for monitoring and voicing relevant questions to those in the room.

Twitter Hashtag: Twitter is the best place to experience the buzz of OpenCon online, as it is the social media platform most actively used by the OpenCon community. Even if they will only be using it for the conference, we recommend that participants sign up for a Twitter account and follow #OpenCon. Both in-person and remote attendees use the hashtag as a forum for online discussion and to summarize key points of the meeting. Because not everybody has a Twitter account, it is important to make it clear in advance that the #OpenCon hashtag is a way to to keep track and actively engage in the conference, and that participants should create a Twitter account before arriving. In future years, we will include a guide for using Twitter in our pre-conference communications so participants can familiarize themselves before arriving.

Note: We recognize that Twitter is a proprietary platform, and while we've chosen Twitter because a large volume of OpenCon community members are on it, other conferences should choose a platform that best fits their community's needs.

WhatsApp Group: We also offered a WhatsApp group for chatting about Open issues during the meeting. These groups are free to set up.

Presenter Q&A: We offered exclusive online Q&A sessions with some of our speakers during the coffee breaks. Questions were collected from Twitter and WhatsApp in a Google Doc and the OpenCon Live host conducted the interview via Facebook Live.

ENFORCING A CODE OF CONDUCT

DO YOU HAVE A COMPREHENSIVE ANTI-HARRASSMENT POLICY?

ARE YOU CLEARLY COMMUNICATING & ENFORCING THE CODE OF CONDUCT BEFORE AND DURING THE MEETING?

IS THE CODE OF CONDUCT STRICTLY ENFORCED?

IS IT EASY TO REPORT VIOLATIONS?

The code of conduct outlines our expectations for participants within the OpenCon community, both online and in-person, as well as steps for reporting unacceptable behavior. We are committed to providing a welcoming and inspiring community for all and expect our code of conduct to be honored. Anyone who violates this code of conduct may be asked to leave the community. All participants are required to review the Code of Conduct when registering for the conference, whether attending in person or online. You can access the full OpenCon Code of Conduct at: www.opencon2017.org/code_of_conduct

WHAT SHOULD IT INCLUDE?

The code of conduct communicates that harassment is not tolerated in the community, and lists types and examples of harassment (e.g. discrimination on the basis of identity and background, sexual harassment, intimidation, etc.) Sections of the OpenCon 2016 Code of Conduct included:

- Diversity statement
- Anti-harassment policy
- Definitions of harassment
- Outline of collective community values and goals

REPORTING PROCESS

A clear reporting process is included in the Code of Conduct webpage. Conference attendees are given a list of people they can contact to report violations of the Code of Conduct including their email addresses and phone numbers. We also specify what to include in a report: the reporter's contact information, names of the individuals involved, an account of what happened, and a link if there is documentation of the incident. We communicate that all requests for confidentiality will be respected. We would suggest having multiple code of conduct contacts, of different genders, seniority levels, and racial backgrounds to help ensure those who have a violation to report feel comfortable doing so. We encourage organizers to be thoughtful about *who* they are choosing as point people in the reporting process: what kinds of complaints might you receive, and who would people feel comfortable reporting these violations to? For instance, a female participant may feel more comfortable reporting sexual harassment to a female point person.

AREAS FOR IMPROVEMENT

Based off participant feedback, we noted a few key areas for improving the OpenCon Code of Conduct in 2017:

- Option of on-site reporting option for urgent issues (including at social events)
- Clearly displayed print copies of Code of Conduct on-site
- Code of Conduct communicated clearly in pre-conference communications and stated at the beginning of the conference in person.
- Stronger enforcement process, decided and communicated in advance to participants
- Option to submit anonymous reports

ADDITIONAL CONSIDERATIONS

PRONOUN RIBBONS

Participants were encouraged to attach a ribbon to their conference badge indicating which gender pronoun they prefer (he, she, they, etc.), which were provided at the registration desk. We included pronoun ribbons to make OpenCon more inclusive of all genders. More information about pronoun ribbons, including templates can be found at www.pronounribbons.org/

DIETARY RESTRICTIONS AND ALLERGIES

When registering for the conference, participants are asked to submit any information about dietary restrictions (food allergies, preferences, or religious restrictions). This is taken into account when ordering meals and catering for participants. Vegetarian options are also included in a when providing participants with a map of restaurants in the area.

We would recommend ordering more vegetarian/vegan options than required, as they can be eaten by most participants and can help ensure you don't run out of meal options for participants with many dietary restrictions. All foods should be clearly and accurately labeled, and consider posting the menu in the online schedule so that people can plan ahead. Make sure that there is easy access to drinking water throughout the day in the venue.

The conference registration can also encourage participants to submit information about allergies and other chemical sensitivities. If required, organizers could address these sensitivities as necessary; for example, by making the conference a fragrance-free space. This can be done by asking for people minimize or not use scented products (e.g. perfume, heavily scented lotions, etc.) in pre-conference communications. This will create a safer and more comfortable experience for those with allergies and chemical sensitivities.

ALCOHOL FREE EVENTS

Most of the OpenCon nighttime social events include alcohol consumption. As we learned during the conference itself in 2016, some participants may not be able to sit a table where someone is consuming alcohol, for religious or personal reasons. In future years, we will ensure there are spaces at receptions where alcohol is not being consumed. We will also explore the option of incorporating alcohol-free events into the evening program.

PARENT-FRIENDLY EVENTS

In order to create a space that's inclusive of participants who are parents bringing along small children to the conference, certain additions to the maternity room can be made. Suggestions might include:

- List of local children's resources
- Explicitly allowing children in sessions
- Providing childcare, or listing local childcare providers/options
- Offering child care scholarships
- Making the agenda public as early as possible so parents can plan accordingly

These are not currently measures we put in place at OpenCon, we are sensitive that people have these needs, and are willing to help provide support within our means.

TRANSIT

Provide clear text and image instructions on how to get to the conference venue (and other relevant conference locations, e.g. if participants will be staying at a designated hotel). Make sure these instructions are print-friendly (and not just a link to a Google Map). Try to know in advance whether any participants have mobility needs and will require alternative transportation arrangements (e.g. arranging for a shuttle between hotel and venue, booking a hotel closer to the venue, etc...). This information can be collected in the conference registration form, or in a pre-conference email.

CHOOSING CONFERENCE DATES

Although many Western organizers generally avoid scheduling events or conferences on traditionally Christian holidays, such as Easter or Christmas, organizers should also be mindful of religious holidays and observances for non-Christian religions as well.

COLLECTING ACCESSIBILITY & HEALTH INFORMATION IN ADVANCE

While we encourage conference planners to design their event in a way that is accessible as possible, participants should also be asked about any specific accessibility needs in advance. This could be done through a pre-conference email or collected through a question in the conference registration form.

Depending on your budget, information collected could include specific access needs (e.g. sign language interpreters, transcription, visual impairments), health requests, and dietary constraints. Offer the option of discussing accessibility needs over the phone; this can minimize forming assumptions about the needs of the participant.

For those receiving travel scholarships, we strongly recommend that any additional travel costs incurred due to accessibility considerations be covered by conference organizers—not the participant.

LAND ACKNOWLEDGEMENT

In some regions (e.g. Canada, United States, Australia, etc.), conversations around diversity should also include conversations around the region's colonial history as well as the effects of colonialism on Indigenous communities in the present-day. A land acknowledgement prompts conference organizers and participants to reflect on the land the conference/event is taking place on. It is a "formal statement that recognizes the unique and enduring relationship that exists between Indigenous Peoples and their traditional territories" (Laurier Students' Public Interest Research Group: Know the Land Territories Campaign).

While a land acknowledgement is by no means comprehensive for rebuilding relationships with Indigenous communities, it is a first step in honoring Indigenous communities, as well as recognizing a region's colonial past and present. There are a number of institutions that provide published land acknowledgements that other event organizers can use, that have been composed in consultation with Indigenous communities. For North Americans, native-land.ca provides a good starting point for learning more about the history of a particular region. More resources and information on land acknowledgements can be found at: http://www.lspirg.org/knowtheland/ — although the specifics will differ from region to region. This is not something we currently do at OpenCon, but are committed to taking into account for future meetings.

ESSENTIAL SUPPLIES

We found that it was helpful to have essential supplies on site, including over-the-counter medicine (aspirin, ibuprofen, etc.), first aid supplies, feminine hygiene products, and snacks between sessions for participants. It is also helpful to note the nearest walk-in medical facility, in case the need arises.

BREAKS

Make sure that adequate breaks are provided throughout the day to accommodate those with health needs. We've found that a full half-hour break in both the morning and afternoon as well as an hour for lunch provides reasonable downtime and space for informal interactions, which are often one of the most productive aspects of the conference. If sessions are running long, we would encourage organizers to protect breaks rather than shortening them.

CONSENT FOR PHOTOS

Some conference participants may not want their photo taken. Consider integrating an opt-in policy for participants to give their consent to have their photo taken (and used for conference social media and subsequent promotional materials). One way to do this is to ask participants to indicate whether they are okay with being photographed through color-coded lanyards. This can be communicated to any event photographers in advance. This is not something OpenCon has done in the past, but will be integrating into future meetings.

COLLECTING FEEDBACK

After the event, identify areas for improvement. Send out an event feedback form that includes a question on whether participant accessibility needs were met.

A CONFERENCE DESIGN CHECKLIST

REPRESENTATION
 Organizing committee includes representation across: gender identities, underrepresented groups, diverse racial backgrounds, geographical regions Ensure gender is balanced within presentation types (especially keynotes), not just the overall program Program includes presenters from a wide range of contexts. Factors to consider include gender identities, racial groups, geographic region, ability, sexual orientation, and career stage, among others Actively solicit proposals and submissions from underrepresented groups For the participant pool, ensure that a proportion of registration spots are allocated to participants across ethnic backgrounds, gender identities, and geographic regions
SCHOLARSHIPS
☐ Scholarship allocation is prioritized for groups that face the most barriers for self-funding
 Conference organizers book travel and/or accommodations on behalf of travel scholarship recipients, rather than asking recipients to pay and be reimbursed
☐ Where partial scholarship funding is provided, make and communicate decisions as quickly as possible, so that recipients can take advantage of lower prices
EVENT VENUE
□ Venue has elevator access, accessible entrances, ramps, and clear, legible signs. For a full list of building requirements, please refer to: http://www.americanbar.org/content/dam/aba/administrative/mental_physical_disability/Accessible_Meetings_Toolkit.authcheckdam.pdf
☐ Venue has gender neutral washrooms or is open to designating specific washrooms as gender neutral
☐ Venue A/V has sound system with microphone & speakers set-up (ideally, wireless microphones)
☐ Set up maternity room at venue
☐ Set up prayer room at venue
☐ Set up quiet room at venue

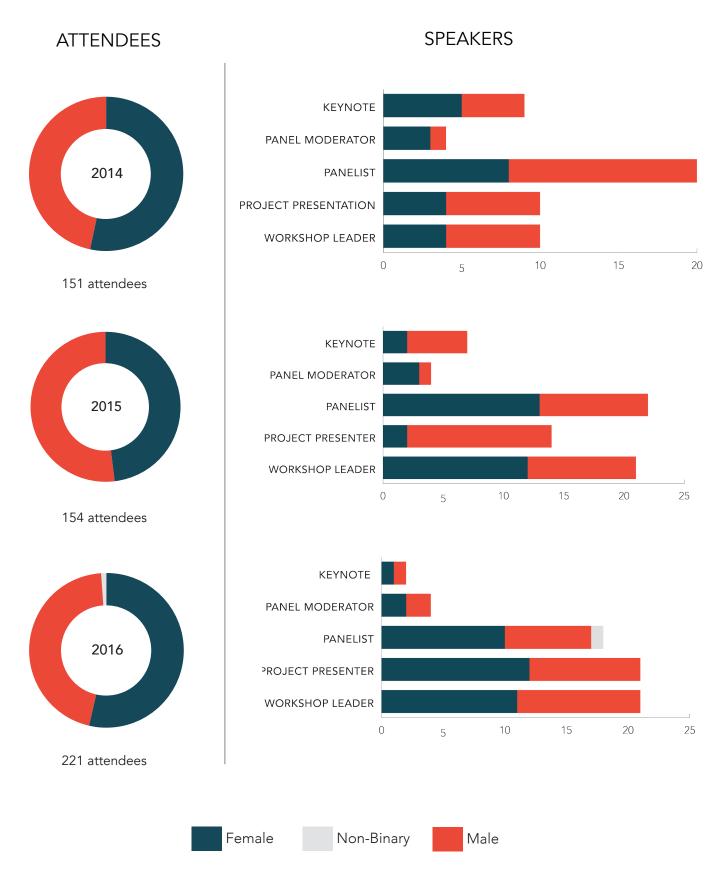
PI	ROGRAMMING DECISIONS
	Hold a workshop, panel discussion, or activity focused specifically on diversity and equity that includes all participants Ensure underrepresented perspectives are prioritized in all aspects of the conference, and especially in dialogues about diversity, equity and inclusion Incorporate participant input into program choices (e.g. through unconference, session proposals)
Α	CCESSSIBLE CONFERENCE MEDIA
&	INCLUSIVE ENGAGEMENT
	Microphone is used for all presenters, and for all Q&A sessions (for both speakers and those asking questions) Have facilitators monitor who is asking questions Allow for remote participation by streaming event online Make materials (video recordings, slides, notes) freely available online to view after the event. This is especially useful if live streaming is not possible. Provide all media in alternative formats: transcripts (or detailed notes) for video-recorded material, closed captioning if possible
	Allow alternative ways to participate in Q&A (e.g. online question submission via Twitter or other platform)
	At least 3 weeks before the event, encourage speakers to review guidelines on designing easy-to-read slides: https://www.w3.org/WAI/training/accessible
	Offer appropriate sign language interpretation during talks if a participant has indicated this accessibility requirement
C	ODE OF CONDUCT &
Α	NTI-HARASSMENT POLICY
	Code of conduct includes zero tolerance policy for discriminatory behaviour on the basis of identity, and zero tolerance for physical, verbal or sexual harassment
	Attendees are asked to read and acknowledge the code of conduct during the registration process
	Code of conduct is on website and sent to all conference attendees before the event
	Code of conduct is re-stated, in person, at the beginning of the conference
П	Hard copies of code of conduct are provided and easily accessed during event

☐ A clear and easy to follow reporting process is decided in advance
☐ Reporting process is communicated clearly before and during the event-en-
sure that at least one designated organizer is easily accessible to receive reports
of code of conduct violations
PRE-CONFERENCE COMMUNICATIONS
ON ACCESSIBILITY & OTHER INFORMATION
☐ Include questions about dietary and accessibility needs in the registration form
 Offer the option of discussing accessibility needs over the phone; this can minimize forming assumptions about the needs of the participant
☐ Be clear on what accessibility accommodations will be provided so partic-
ipants can request or arrange additional accommodations that have not
already been covered, rather than putting the burden on them
☐ Communicate the schedule in advance so participants can communicate any
accommodations they will need (e.g. long conference days or hackathon style
events may not be possible for those with certain health needs)
TRANSIT
TRANSIT □ Provide clear text and image instructions on how to get to the conference
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 □ Provide clear text and image instructions on how to get to the conference venue (and other relevant conference locations, e.g. if participants will be staying at a designated hotel) □ Make sure these instructions are print-friendly (and not just a link to a Google Map) □ Know in advance whether any participants have mobility needs and will require alternative transportation arrangements (i.e. not public transit) □ Ask about this when asking about additional accessibility requirements in the conference registration form, or in a pre-conference email DIETARY □ Information about dietary needs of participants is collected in advance

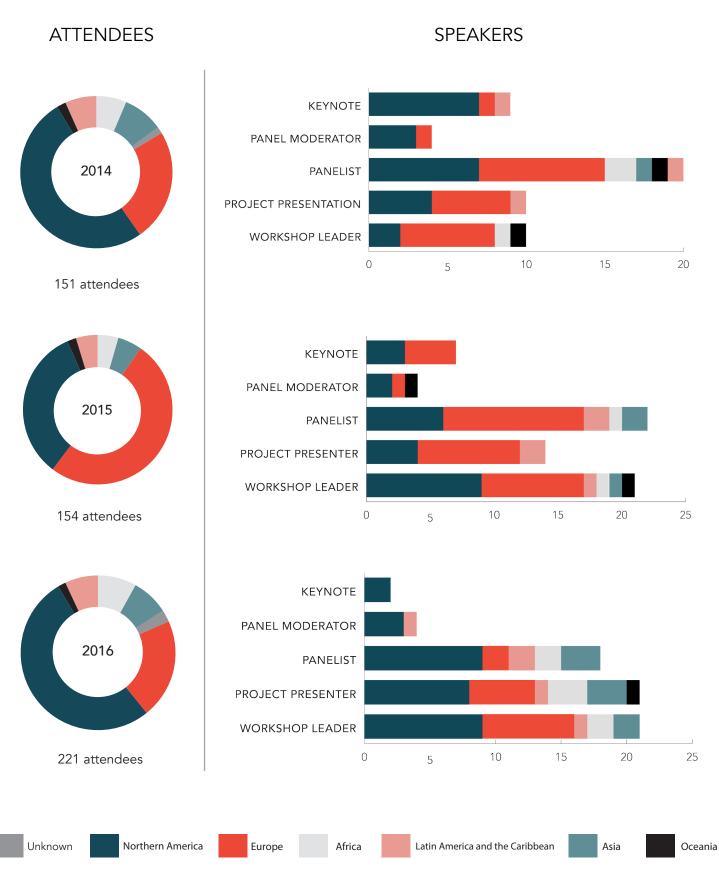
ט	URING CONFERENCE
	Participants are asked to communicate their preferred pronoun (he, she, they, etc.) on their conference badge; consider using pronoun ribbons
	http://pronounribbons.org
	Adequate breaks are provided throughout the day to accommodate those with health needs
	Have essential supplies on hand, including over-the-counter medicine (aspi-
	rin, ibuprofen, etc.), first aid supplies, feminine hygiene products, and food
	A land acknowledgement is included during the opening, when appropriate.
C	ONFERENCE SOCIAL EVENTS
	Ensure there is a designated conference organizer present at all social events
	to report code of conduct violations to, and that this organizer is easily
	visible and accessible
	Provide an option for alcohol-free evening social events; or choose events
	that are not centred around alcohol
CI	HILDCARE
	Consider providing childcare
	If providing childcare is not possible, provide a list of local child care options
	Consider offering full or partial reimbursement for childcare as part of scholarships
	Provide list of local children-related resources
Α	FTER THE CONFERENCE
A	In the event feedback form, include a question on whether participant acces-

OPENCON 2014-2016 SELF ASSESSMENT

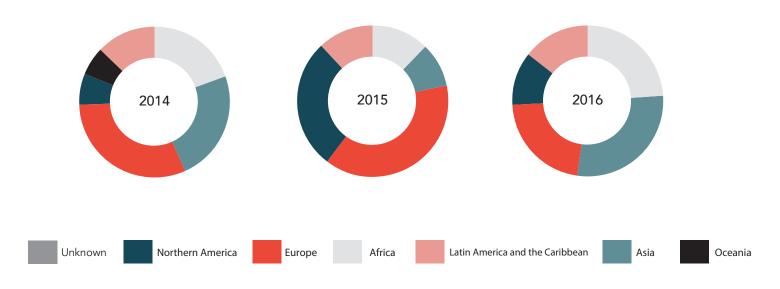
GENDER REPRESENTATION



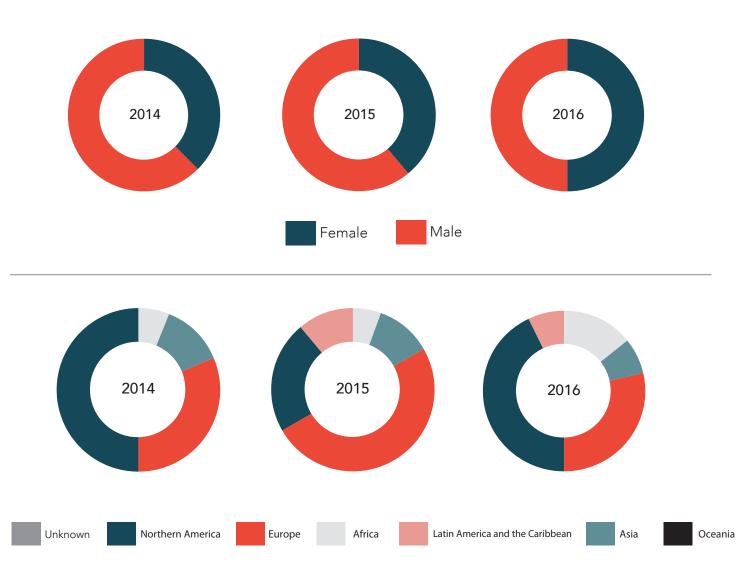
REGIONAL REPRESENTATION



GENERAL SCHOLARSHIP ALLOCATION



ORGANIZING COMMITTEE



TABLES

TABLE 1. GENDER REPRESENTATION ACROSS ATTENDEES

	Female	Male	Non-Binary
2014	81	70	0
2015	74		0
2015	74	80	0
2016	119	100	2

TABLE 2. GENDER REPRESENTATION ACROSS SPEAKER TYPES

		Keynote	Panel Moderator	Panelist	Project Presenter	Workshop Leader
2014	Female	5	3	8	4	4
	Male	4	1	12	6	6
2015	Female	2	3	13	2	12
	Male	5	1	9	12	9
2016	Female	1	2	10	12	11
	Male	1	2	7	9	10
	Non- Binary	0	0	1	0	0

TABLE 3. REGIONAL REPRESENTATION ACROSS ATTENDEES

	Unknown	Africa	Asia	Europe	Latin America & the Carib- bean	Northern America	Oceania	
2014	2	10	13	36	10	77	3	
2015	0	7	8	78	7	51	3	
2016	5	18	17	46	15	116	4	

TABLE 4. REGIONAL REPRESENTATION ACROSS SPEAKER TYPES

		Keynote	Panel Moderator	Panelist	Project Presenter	Workshop Leader
2014	Africa	0	0	2	0	1
	Asia	0	0	1	0	0
	Europe	1	1	8	5	6
	Latin America & the Caribbean	1	0	1	1	0
	Northern America	7	3	7	4	2
	Oceania	0	0	1	0	1
2015	Africa	0	0	1	0	1
	Asia	0	0	2	0	1
	Europe	4	1	11	8	8
	Latin America & the Caribbean	0	0	2	2	1
	Northern America	3	2	6	4	9
	Oceania	0	1	0	0	1
2016	Africa	0	0	2	3	2
	Asia	0	0	3	3	2
	Europe	0	0	2	5	7
	Latin America & the Carribbean	0	1	2	1	1
	North America	2	3	9	8	9
	Oceania	0	0	0	1	0

TABLE 5. GENERAL SCHOLARSHIP ALLOCATION BY REGION

	Africa	Asia	Europe	Latin America & the Caribbean	Northern America	Oceania
2014	\$15,074.41	\$18,088.4	\$23,936.28	\$9,697.00	\$5,065.2	\$4,578.00
2015	\$3,781.70	\$2,882.58	\$11,784.72	\$3,596.05	\$8,426.03	\$250.00
2016	\$16,766.45	\$19,934.31	\$15,200.95	\$9,987.33	\$8,028.20	\$950.00

TABLE 6. ORGANIZING COMMITTEE GENDER REPRESENTATION

	Female	Male	Non-Binary
2014	6	10	0
2015	7	11	0
2016	7	7	0

TABLE 7. ORGANIZING COMMITTEE REGIONAL REPRESENTATION

	Africa	Asia	Europe	Latin America & the Caribbean		Oceania
2014	1	2	5	0	8	0
2015	1	2	9	2	4	0
2016	2	1	4	1	6	0

NOTES ON THE DATA PRESENTED

- For the demographic breakdown of participants, organizing committee, and speakers we used used each participant's country of citizenship to define their region for the purpose of this report, (as opposed to their current country of residence).
- The anonymized data that underlies this report is made openly available and can be accessed at: https://github.com/sparcopen/opencon-dei-report
- The option to select "non-binary" or submit an alternative answer for gender identity was only introduced in 2016
- The general scholarship pool does not include selected sponsorships, which are funded by particular institutions/ organizations for members of those institutions/organizations, and does not include members of the Organizing Committee.
- For this report, keynote speakers are speakers who are given their own speaking slot on the program

REGIONAL DIVERSITY OF SPEAKERS

We recognize that the diversity of a meeting is reflected not only in the participant pool, but through invited speakers and presenters—those who often have the highest visibility during a meeting. People are working to advance Open Access, Open Data, and Open Education in a large variety of contexts and cultures, and it is important that our program reflects that, though we recognize OpenCon can still improve significantly in this respect.

Since 2014, a component of OpenCon has included lightning talks called "project presentations" where participants give 3-minute talks on a project or project idea. The first two years we allocated these based on an open call, which led to significant overrepresentation of speakers from Western countries. For instance, in 2015, project presenters were almost entirely Northern American or European; there were only 2 presenters from Latin America/the Caribbean, and no presenters from Asia, Africa, or Oceania (Table 4).

In 2016, we made a concerted effort to reach out to potential project presenters from regions outside of Northern America and Europe. We found that the increase in geographic representation on stage strengthened the program by showcasing projects and initiatives across a wider range of geographical and cultural contexts.

With all this in mind, we recognize that we still have significant room for improvement in this domain. Since 2014, we have asked for established speakers to cover their own cost of attendance (which nearly all have done) in order to allocate as much funding as possible toward travel scholarships. However, this has contributed to a significant overrepresentation of Northern American and European speakers in OpenCon's panels and keynotes. We are committed to continuing to improve the regional diversity of speakers at OpenCon in future years by continuing to draw speakers from our global scholarship participant pool and providing travel funding to speakers where necessary.

GENDER DIVERSITY OF SPEAKERS

In 2015, we began tracking the gender representation across all speakers on our program. However, without tracking the balance within different speaker categories (i.e. panelists, keynote speakers, project presenters), we neglected to note an overrepresentation of male keynotes: in 2015, five out of seven keynote speakers were male. There was a similar overrepresentation of male project presenters that year who volunteered during the open call: twelve of fourteen presenters were male.

Since 2015, we have paid closer attention to gender representation across all speaker types—especially to keynotes, due to their heightened visibility and prominence in the program. For lightning talk project proposals, we have since taken into account gender balance in the selection process. We understand the importance of recognizing that there is no scarcity of female-identifying people working in Open: organizers can visit the Women Leaders in Open database, which has over 500 women listed, when looking for female-identifying speakers. Access the database here: https://fyoaw.vickysteeves.com/index.html

RACIAL AND ETHNIC DIVERSITY OF SPEAKERS

In past conference years, we have not collected data on the racial background/ethnicity of our speakers. We have received feedback from conference participants regarding the lack of racial diversity with respect to keynote speakers. We recognize that in addition to gender and geographical diversity, racial diversity of speakers is something that needs to be paid attnetion to. Moving forward, we are committed to ensuring keynote speakers come from a wider diversity of racial backgrounds. We will also be asking speakers to indicate their racial/ethnic background when registering.

CAREER STAGE OF SPEAKERS

While this report doesn't detail the career stage of speakers, we made a shift in 2016 to construct much of the program with early career presenters from the participant pool. This preference reflects OpenCon's mission to engage the next generation. However, we would also encourage other organizers to ensure a variety of career stages are represented on stage.

SCHOLARSHIP ALLOCATION

OpenCon's general scholarships (provided to those who apply to attend through our general application process) are a defining characteristic of the conference and enable the participant pool to be as globally inclusive as possible within financial constraints. The allocation of general scholarships is decided by community reviews of applications followed by individual decisions made by our Organizing Committee. In 2014 and 2016, the bulk of scholarship funding was allocated to applicants from countries outside of Northern America and Europe; however, in 2015, a majority of funding went to Northern American and European recipients. In 2016, we made a concerted shift to allocate a greater amount of funds to those outside these regions (see Table 5) and will continue to make this a priority moving forward. The ability of OpenCon to continue providing significant scholarship funding depends on the continued financial support from the wider community.

ORGANIZING COMMITTEE

The OpenCon Organizing Committee plays a central role in shaping the meeting. Organizing Committee members help determine the program, deciding which applicants to accept, as well as whom to offer scholarships. While our first three organizing committees have included members from across different geographic regions, we plan to continue increasing representation from Africa, Asia, Latin America and the Caribbean, and Oceania. We also will ensure the gender balance remains close to 50/50 for future meetings (our previous committees have had more men than women).

We've found that having voices from different regions and different disciplines in an Organizing Committee has been essential to crafting a successful meeting—working with the community we hope to empower rather than just creating a meeting for them. We would strongly encourage other conference organizers to utilize an organizing committee to solicit representative input from the community you're working within and ensure that committee has representation across various characteristics—region, discipline, career stage, etc.

KEY AREAS FOR IMPROVEMENT

To summarize, OpenCon is committed to making the following improvements for future conferences:

- 1. Continue prioritizing participant diversity
- 2. Continue increasing speaker diversity, especially for keynotes
- 3. Improve the way the Code of Conduct is communicated and enforced:
- 4. Clearer communication of Code of Conduct, both in pre-conference communications and on-site
- 5. Establish a process for reporting Code of Conduct violations on-site (including at social events)
- 6. Stronger enforcement process, decided on and communicated in advance to participants
- 7. Build in supports and accommodations for English as a second language speakers
- 8. Include alcohol-free evening events
- 9. Begin conference opening with a land acknowledgement, when appropriate
- 10. Communicate venue accessibility information in pre-conference communications
- 11. Communicate with conference participants more proactively in advance of conference to collect information about and to better understand their accessibility needs.
- 12. Send presenters guidelines on designing accessible slide decks
- 13. Recruit formal note-taking team for conference sessions, and if possible, include closed captioning for OpenCon video materials
- 14. Provide a list of resources for those travelling with children
- 15. Continue providing space for conversations around diversity, equity, and inclusion to occur—both during the physical conference, and in the Open communities more broadly.
- 16. Collecting feedback on issues related to diversity, equity, and inclusion from our community.
- 17. Explore hosting future OpenCon global meetings outside Europe and Northern America

SOURCES

Research for this document was based on the following sources:

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Guide for Hosting Accessible and Inclusive Events, York University Registrar's Office

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Laurier Students' Public Interest Research Group: Know the Land Territories Campaign: http://www.lspirg.org/knowtheland/

Planning Accessible Meetings and Events: A Toolkit, American Bar Association:

 $https://www.americanbar.org/content/dam/aba/administrative/mental_physical_disability/Accessible_Meetings_Toolkit.auth-like the properties of the properti$

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CONTRIBUTE YOUR SUGGESTIONS

This report is a compilation of learnings from the last three years—but we know that there is room for improvement. We hope to receive community feedback, contributions, corrections, or additions to the report. There are a few ways to contribute:

- Email us your feedback at opencon@sparcopen.org
- Get in touch with us on Twitter @open_con
- Contribute directly to our digital report, which will be updated periodically: https://sparcopen.github.io/opencon-dei-report/
- Instructions for contributing can be found here:

 https://github.com/sparcopen/opencon-dei-report/blob/master/Contributing.md
- Provide public feedback or start a discussion by creating an issue on Github at: https://github.com/sparcopen/opencon-dei-report/issues



OpenCon is a project of SPARC (the Scholarly Publishing and Academic Resources Coalition) and its student program, the Right to Research Coalition.



