
Diversity, Equity, and Inclusion Event Planning Checklist

Pre-Event Thought Leadership	3	Final Pre-Event Considerations	6
Invitations to Moderators/Speakers	4	During the Event	7
Date, Catering, and Venue Selection	5	After the Event	7
Event Promotion and Registration	5		
Moderator Preparation	6	Quick Reference Guide	8

This event planning checklist is meant to serve as a resource in order to equip our community members with the tools necessary to identify opportunities and unique challenges in thinking about diversity, equity, and inclusion as it relates to our event planning processes. CBS events range in size, from intimate dinner gatherings to large conferences, but this list provides basic guidelines in order to make all events as inclusive as possible. As always, we recognize that specific issues may arise outside of these guidelines. Please know that the DEI Office is here to help and will gladly consult on all DEI-related topics at hand when it comes to event creation, coordination, and execution.

Note: For brevity purposes, “representation” as used in this list refers to, but is not limited to, being inclusive of all people across culture, gender, race, geographic origin, citizenship, marital status, age, non-native speakers, physical abilities/qualities, sexual orientation/gender identity, religious affiliations, political viewpoints, educational backgrounds, and professional experience.

Please refer to the Quick Reference section at the end of this document for an abbreviated event planning checklist and a moderator preparation checklist.

This checklist was developed through a partnership between the Diversity, Equity, and Inclusion Office and the Sanford C. Bernstein & Co. Center for Leadership and Ethics, with input from CBS staff and students. This is a living document and will be continually updated.

01**Pre-Event Thought Leadership**

- **Establish an Event Coordination Team**
As part of the pre-event thought processes, include diverse perspectives in your brainstorming sessions. This may include developing an event coordination team composed of diverse representatives and/or soliciting feedback from the DEI Office during the planning process.
- **Establish a clear purpose and target audience for the event**
Establish main priorities/goals for event with event coordination team and decide upon key target audience groups.
- **Agenda Creation**
When developing the agenda, provide ample time for brainstorming sessions to ensure that you are thinking through possible DEI-related topics that could be incorporated into the agenda, or could be addressed specifically through DEI-related questions as part of the panel/keynote/lecture aligned with your event goals. Possible topics in this space include:
 - **Equal Employment Opportunity Commission (EEOC) related categories**
 - Ability, disability, and ableism
 - Discrimination in the workplace
 - Faith, religious identity or secular worldview
 - Gender identity and equity
 - Global citizenship
 - Intergenerational differences
 - LGBTQIA+ identity and equity
 - Partnership benefits
 - Racial identity and equity
 - Sexual respect
 - Socioeconomic status and classism
 - **Non-Equal Employment Opportunity Commission categories**
 - Managing difficult conversations
 - Microaggressions
 - Mitigating bias
 - Privilege and power
 - Social justice issues
 - **DEI processes, systems and structures**
 - Communicating across identities
 - Data metrics on DEI outcomes
 - DEI-related governance issues
 - Industry specific DEI issues
 - Historical discrimination in different industries or areas
 - Specific DEI policies at individual companies, i.e. multinational companies - how do they think about employee welfare across geographical regions
 - Work-life balance/fit
 - **DEI from the perspective of leadership**
 - Creating an inclusive environment
 - How top leadership thinks through DEI as part of the overall business strategy
 - Leading with empathy
 - Making the business case for diversity
 - The role of business in society
- **Phillips Pathway for Inclusive Leadership (PPIL)**

Align your programming to the inclusive leadership skills and learning outcomes of the PPIL program. Submit your event for PPIL approval during the event request process on CampusGroups.

- **Moderator/Speaker Sourcing and Selection**

Ensure proper time is given to researching and sourcing representative moderators/speakers/panelists. Resources for speakers include:

- External audience outreach: reach out to your department/club's Development and Alumni Relations liaison
- Past speaker suggestions: ask your past speakers

for their suggested contacts, noting that we'd like to increase our outreach to diverse leaders in their industry/field

- Recommendations from other thought leaders at the

School, including the DEI Office, Centers & Programs, Academic Divisions, Dean's Office, CaseWorks, Samberg Institute, student-run clubs and programs (CBS Reflects, BBSA, CWIB), etc.

- Columbia Business School LinkedIn Group
- Community resources in New York City, for example
The Center for LGBTQ+ contacts

- Consider hosting your event virtually to allow for a greater geographical reach for your speakers/moderators

- **Establish an event budget**

Ensure your event budget factors in costs including accessibility accommodations and inclusive catering options (more details on both considerations below).

02

Invitations to Moderators/Speakers

- **Moderator/Speaker Invitation**

As part of the formal invitation, specifically include language on particular DEI issues you would like to address to gauge comfort levels and fit for conversation.

- **Moderator/Speaker Demographic Tracking**


Once speakers have accepted your invitation to speak, please request relevant demographic information for tracking purposes (gender pronouns/race/education level). Some guidance for requesting this information is as follows:

- Once your speaker has confirmed, add language to your bio/headshot request to ask for demographic information (gender pronoun/race or ethnicity/education level). You can specifically state: "As part of our ongoing efforts to build a more inclusive environment at CBS, all speakers are being asked to provide us with demographic information, to the extent they feel comfortable sharing that with us. This includes gender pronouns, race or ethnicity, and education level. Please know that this information is voluntarily being collected in order to better track our efforts as a School as part of the DEI Office through the Dean's Office, and is not a mandatory requirement for participation in an event."

03**Date, Catering, and Venue Selection**

- **Strive to avoid religious and cultural days of observance and CBS blackout dates when selecting event date**
- **When possible, solicit an array of locally owned caterers for your events.** *[Please note UEM policies on catering deliveries to Geffen and Kravis.]*
- **For external events, solicit venues that cater to accessibility needs, for instance, elevator access, ADA restrooms, accessible entrances (without stairs/steps), ramps, wheelchair/low vision/low hearing seating, clear and legible signs, etc.**
- **Ensure that venue has all-gendered restrooms or is open to designating specific restrooms as gender neutral**
- **Ensure that venue has the option to set up designated rooms as needed and when applicable – lactation room, prayer room, quiet room, etc.**

04**Event Promotion and Registration**

- **Ensure event promotion language and visuals are inclusive for target audiences. Please see this example for a guide to inclusive language and also utilize your event coordination team to review promotional copy:**
 - See the [Guide for Inclusive Language](#) 
- **When applicable, ensure event promotion is sent to a representative range of prospective attendees in target audience. Resources include:**
 - Targeted promotions to alumni database, contact Development and Alumni Relations (Alexandra Kennedy, Associate Director, Alumni Relations).
- For social media inquires, please contact Catherine Downey, Associate Director, Social Media
 - University Partners: Including other Colleges, Admissions, Centers and Programs etc.
- Practitioners: targeted promotion to industry practitioners through professional networks/groups
- Affinity Student Groups/Organizations (i.e. BBSA, HBA, CWIB, CBS Reflects, etc.)
- **When applicable, include questions about dietary and accessibility needs in registration form. Question examples include:**
 - Open ended: Please let us know of any accessibility needs.
 - Multiple choice: Do you have any known dietary restrictions that we should be aware of? Options: Kosher, Halal, vegetarian, vegan, dairy-free, gluten-free, other.
- **When applicable, ensure that registration form includes option to enter gender pronouns with the option to print pronouns on attendee nametags.**

05**Moderator Preparation**

- **Prepare moderator(s) with panelist identification information and DEI-related questions.**
 - Pronoun, phonetic spelling, or identification-related information for each panelist that the moderator will be referring to consistently. Ensure the moderator's comfort with this information.
 - Specific list of DEI-related questions - discuss in advance any DEI-related topics to address
- **Pre-plan how moderator(s) would prefer to solicit questions/feedback from audience in order to ensure that many perspectives are included. Some options include:**
 - Two open mics where audience members can line up with questions
 - Pre-submitted questions as part of registration form
 - Real-time questions submitted via apps such as Poll Everywhere or social media
- **Ensure that moderator is prepared to handle sometimes sensitive subjects (related to race, gender, orientation, ability, etc.) that may arise as part of these**

discussions. Plan to talk through specific processes to make sure the conversation is posed in an educational and respectful manner.

- Set ground rules at the start of the conversation
 - Purpose of conversation is to provide an educational and safe context in which to discuss these sensitive issues. We ask all audience members to be respectful of differing opinions and ask all participants to actively listen in order to ensure an open dialogue.
 - Use "I" statements when speaking from individual experience
- When applicable, offer to keep the conversation "off the record" or apply "Chatham house rule" so all parties feel comfortable discussing sensitive issues
- Allow the moderator to feel empowered and in control of the discussion
 - i.e. if an audience member proves to be disrespectful, they can kindly let them know they are disrespecting stated ground rules and will not be able to participate if they continue with behavior.
 - Always provide back-up assistance as event coordinator to moderator.

06**Final Pre-Event Considerations**

- **Accessibility Needs:**

When needed, provide sign language services or offer assistive learning devices (ALD) or closed captions if audience members request services. Reconfirm physical access and elevator function with venue.

 - Contact the Columbia University Office of Disability Services for [Sign language and speech-to-text services](#).

- **Food Preparation**

Offer Kosher, Halal, vegetarian, vegan, dairy-free, and gluten-free options as needed, and clearly label any buffet-style meals
- **Pre-event communication**

Provide all guests with a guided map to note accessibility entrances/exits for the venue

07**During the Event**

- **At Registration**
 - Make sure check-in tables, signs and materials are easily accessible and readable to attendees with disabilities
 - Post signage at registration table if any portion of the event is being recorded
- **During the program, have designated reserved seating available for anyone who that who may need it or request it day-of, being mindful of space and ease of accessibility for those in need (pregnant attendees, attendees with disabilities, older adults, etc.).**

08**After the Event**

- **Send a post-event survey that asks about inclusion and accessibility at the event. Post-event survey sample questions examples include:**
 - “The event included a diversity of thought.” (Rate from Strongly Agree to Strongly Disagree on a 5-option scale).
 - “The event speakers/moderators were representative and diverse” (Rate from Strongly Agree to Strongly Disagree on a 5-option scale).
 - When applicable: “The event expanded my capacity to think about diversity, equity, and inclusion-related topics.”
 - When applicable: “My accessibility needs were met during the event.” (Yes, No, Not applicable).
- **Send thank you notes to panelists/keynote/lecturers.**
 - If they incorporated DEI in a specific way, thank them for being candid and open with their responses that helped set the tone for the conversation.
 - Solicit suggestions for future speakers and panel content topics to include in the conversation.

Quick Reference Guide

Event Planning Checklist

- **Pre-Event Thought Leadership**
- **Establish an Event Coordination Team:** As part of the pre-event thought processes, include diverse perspectives in your brainstorming sessions. This may include developing an event coordination team composed of diverse representatives and/or soliciting feedback from the DEI Office during the planning process.
- **Establish a clear purpose and target audience for event:** Establish main priorities/goals for event with event coordination team and decide upon key target audience groups.
- **Establish an event budget:** Ensure your event budget factors in costs including accessibility needs and inclusive catering options.
- **Agenda Creation:** When developing the agenda, provide ample time for brainstorming sessions to ensure that you are thinking through possible DEI-related topics that could be incorporated into the agenda, or could be addressed specifically through DEI-related questions as part of the panel/keynote/lecture aligned with your event goals.
- **Moderator/Speaker Sourcing and Selection:** Ensure proper time is given to researching and sourcing representative moderators/speakers/panelists.
- **Invitations to Moderators/Speakers**
- **Moderator/Speaker Invitation:** As part of the formal invitation, specifically include language on particular issues you would like to address to gauge comfort levels and fit for conversation.
- **Moderator/Speaker Demographic Tracking:** Once speakers have accepted your invitation to speak, please request relevant demographic information for tracking purposes (gender pronouns/race or ethnicity/education level).

Date, Catering, and Venue Selection

- Strive to avoid religious and cultural days of observance and CBS blackout dates when selecting event date
- When possible, solicit diverse and locally owned caterers for your events. [Catering list forthcoming]
- Solicit venues that cater to accessibility needs, for instance, elevator access, ADA restrooms, accessible entrances (without stairs/steps), ramps, wheelchair/low vision/low hearing seating, clear and legible signs, etc. [External venue list forthcoming]
- Ensure that venue has all-gendered restrooms or is open to designating specific restrooms as gender neutral

- Ensure that venue has the option to set up designated rooms as needed and when applicable – lactation room, prayer room, quiet room, etc.

Event Promotion and Registration

- Ensure event promotion language and visuals are inclusive for target audiences.
- When applicable, ensure event promotion is sent to a diverse range of prospective attendees in target audience.
- When applicable, include questions about dietary and accessibility needs in registration form.
- When applicable, ensure that registration form includes option to enter gender pronouns with the option to print pronouns on attendee nametags.
- Prepare moderator(s) with panelist identification information and DEI-related questions.
- Pre-plan how moderator(s) would prefer to solicit questions/feedback from audience in order to ensure that underrepresented perspectives are included.

Moderator Preparation

- Ensure that moderator is prepared to handle sometimes sensitive subjects (related to race, gender, orientation, ability, etc.) that may arise as part of these discussions. Plan to talk through specific processes to make sure the conversation is posed in an educational and respectful manner.

Final Pre-Event Considerations

- **Accessibility Needs:** When needed, hire sign language services or offer assistive learning devices (ALD) or closed captions if audience members request services. Reconfirm physical access and elevator function with venue.
- **Food Preparation:** Offer Kosher, Halal, vegetarian, vegan, dairy-free, and gluten-free options as needed, and clearly label any buffet-style meals
- **Pre-event communication:** Provide all guests with a guided map to note accessibility entrances/exits for the venue

During the Event

- **At Registration:**
 - Make sure check-in tables, signs and materials are easily accessible and readable to attendees with disabilities
 - Post signage at registration table if any portion of the event is being recorded
- During the program, have designated reserved seating available for anyone who that who may need it or request it day-of, being mindful of space and ease of accessibility for those in need (pregnant, disabled, elderly, etc.).

After the Event

- Send a post-event survey that asks about inclusion and accessibility at the event.
- Send thank you notes to panelists/keynote/lecturers.