

Inclusive Finance Accessible Training & Meeting Cheat Sheet

In-Person / Virtual Meeting or Training for Inclusive Finance



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Disclaimer

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Introduction

Globally, one in six people lives with a disability, making people with disability the largest minority group in the world. Among women, the prevalence is even higher—one in five women has a disability. These figures underscore the urgent need for Financial Service Providers (FSPs) to ensure that their services, including meetings and engagements, are fully accessible and inclusive.

Meetings—whether in-person or virtual—are central to how FSPs communicate, collaborate, and deliver financial services. However, without intentional planning, these meetings can unintentionally exclude people with disability, limiting their participation, voice, and impact. In addition to promoting accessibility and inclusion, this resource also offers practical tips for virtual meetings and training to support cost-effectiveness and digital transformation.

Opportunity also encourages its partners and people with disability to engage in peer learning groups organised by leading institutions such as the International Labour Organization (ILO), CGAP, UNDP, Centre for Financial Inclusion, and others. These platforms help partners stay informed about the latest trends and innovations in development finance, fostering continuous learning and inclusive practice.

This Inclusive Finance Accessible Training & Meeting Cheat Sheet promotes inclusive practices that enable FSPs to align with global standards and human rights principles, while strengthening their mission to serve diverse communities equitably. It offers practical guidance for hosting inclusive in-person and virtual meetings or trainings, supporting value-for-money approaches in the context of increasing digitalisation and the environmental impact of travel and transportation.

This cheat sheet is a living document and will be reviewed and updated annually in the second quarter to ensure its continued relevance and effectiveness.

Before your meeting

Inclusive invitations

- Use clear, respectful language in your invitations
- Ensure that the invite includes options for accessibility support (e.g., interpreters, captions)
- Ask attendees if they have any specific accessibility needs
- Allow multiple methods of RSVP (phone, email, online etc.)
- Include visual descriptions of presenters in invitations to support blind or low-vision participants

You're invited: Inclusive Finance Information Session

Join us for an engaging and informative session on inclusive finance opportunities in our community.

Date: Monday, August 4, 2025

Time: 2:00pm – 3:00pm

Location: Room 1, Community Resource Centre, 1 Main Street

Online Option Available: Zoom link provided upon RSVP

What to expect

- Learn how inclusive finance can support your goals
- Hear from local experts and community practitioners
- Q&A session to address your questions

Accessibility and Support

We are committed to making this session inclusive and accessible to all. At the meeting, we will have:

- Live captions available for online attendees
- Sign language interpreter services are available on request.
- Wheelchair accessible meeting room
- Meeting documents will be sent to attendees on DD/MM/YY

If you have specific accessibility needs, please let us know when you RSVP.

RSVP by DD/MM/YY

Choose the method that works best for you:

- Call (02) 1234 5678
- Email info@example.org
- Online form: www.inclusive finance.com

We look forward to welcoming you!

Registration Form: Inclusive finance Information Session

Name:

Email:

Phone:

Role and Organisation:

Attendance Preference

Please select one:

- ☐ I will attend in person
- ☐ I will attend online

We are committed to making this session inclusive and accessible. Please let us know if you require any of the following:

- ☐ Wheelchair access
- ☐ Sign Language interpreter
- ☐ Live captions
- ☐ Materials in large print
- ☐ Materials in plain language
- ☐ Audio description
- ☐ Quiet space
- ☐ Other (please specify)

How familiar are you with the subject?

- ☐ Preliminary
- ☐ Intermediate
- ☐ Advanced
- ☐ Other

During the meeting we may take photos. Do you consent to these images being uploaded onto our public website and social media (e.g. LinkedIn)?

- ☐ Yes
- ☐ No

Please note, as an online attendee, you may turn your camera off if you do not wish to be recorded/photographed.

Additional notes or questions:

RSVP options

- Call (02) 1234 5678
- Email info@example.org
- Online form: www.inclusive finance.com

Provide key information in advance

Key information may include:

- Parking availability and accessibility
- How to enter the building or meeting room
- Location of accessible bathrooms
- How to get help en route or on arrival
- The meeting agenda and materials in accessible formats

Example Meeting Agenda

2:00 PM – Welcome and Acknowledgement of Country

- Host: *Maria Lopez*
- Visual description: *Latina woman with short curly hair, wearing glasses and a blue blouse*
- Brief welcome and acknowledgement of Traditional Custodians of the land

2:10 PM – What is Inclusive finance?

- Presenter: *James Park*
- Visual description: *Asian man with short black hair, wearing a white shirt*
- Overview of inclusive finance and how it supports individuals and small businesses

2:30 PM – Local Inclusive finance Programs

- Information on available services, eligibility, and how to apply
- Printed and digital handouts available in large print and plain language

2:50 PM – Community Voices: Stories of Impact

- Short video and live testimonials from local participants
- Captions and audio descriptions provided

3:10 PM – Q&A and Open Discussion

- Ask questions in person, via chat, or anonymously on paper or online
- Sign Language interpreter and live captions available

3:25 PM – Closing Remarks and Next Steps

- Summary of key points
- Contact information and support resources shared

Starting your meeting

Provide an Acknowledgement of Country

“We acknowledge the Traditional Custodians of the land on which we meet today and pay our respects to Elders past and present. We extend that respect to Aboriginal and Torres Strait Islander peoples joining us today.”

To find out what country you are on in Australia, you can use this link: aboriginal.land

- Include cultural mindfulness by inviting participants to reflect on the land's history and their relationship to it
- Provide calming centring exercises or guided breathing to help participants feel grounded and fully present

Mutual introductions

- Each person invites the next to speak, allowing passes and reducing dominance. Ask questions like:
 - What brought you here today?
 - What's one value that guides your work?
 - What's a hope you have for this meeting?

Meeting overview and expectations

- Outline the meeting's purpose, structure, and expected outcomes
- Say how you would like people to engage with the meeting (hand up, message, continuous or hold until the end etc.)
- Tell people who they can contact for tech support or other issues during the meeting
- Allow different methods of listening, e.g., sitting, standing, walking around the room

During your meeting

Inclusive facilitation practices

- Use liberating structures such as:
 - 1-2-4-All – individual reflection o pair, to four, to whole group
 - World cafe – small group rounds with rotating participants and a harvest session

Accessible team building activities

- Choose activities that are inclusive of different physical, sensory, and cognitive abilities (such as sitting only or low vision activities)
- Offer alternatives to physical or high-energy tasks
- Ensure instructions are clear and available in multiple formats
- Consider using story listening by inviting participants to share personal or organisational stories

- Consider using graphic recording to visually capture ideas for visual learners and those with hearing impairments
- Offer quiet spaces and opt-out options for sensory-sensitive participants

Example Activities

Collaborative Storytelling

- How it works: Each participant contributes a sentence or idea to build a story.
- Accessibility: Can be done verbally, via chat, or using visual aids. Supports different communication styles and can be done asynchronously.

Visual Icebreaker Boards

- Tools: Use [Miro](#) or [Padlet](#).
- Activity: Ask participants to post images, emojis, or drawings that represent their mood, interests, or goals.
- Accessibility: Allows non-verbal expression and supports screen readers and keyboard navigation.

“Two Truths and a Lie” (Modified)

- How it works: Participants share two true facts and one false one about themselves.
- Accessibility: Can be shared in writing, spoken aloud, or via assistive tech. Ensure time flexibility and alternative formats.

Sensory-Friendly Show & Tell

- Activity: Participants bring or describe an object that brings them comfort or joy.
- Accessibility: Encourages personal expression and can be adapted for visual, auditory¹, or tactile² preferences.

Puzzle or Trivia Challenges

- Tools: Use accessible platforms like [Kahoot](#) or [Quizizz](#).
- Accessibility: Ensure screen reader compatibility, adjustable timing, and visual contrast. Offer questions in multiple formats.

Values Mapping

- Activity: Participants choose values from a list and explain why they matter to them.
- Accessibility: Can be done with visual cards, text, or audio. Supports reflective and expressive styles.

Mindfulness Moments

- Activity: Guided breathing or visualisation exercises.
- Accessibility: Offer options to opt out or use alternative calming techniques. Avoid triggering language or imagery.

Paired Introductions

- Activity: Participants pair up and introduce each other to the group.

¹ Auditory preferences refer to ways of engaging with content through sound.

² Tactile preferences refer to engaging with content through touch.

- **Accessibility:** Allows for smaller, quieter interactions. Can be done via chat, or breakout rooms.

Consider sub-groups to drive engagement

- Use breakout rooms or interest-based groups with clear instructions and support
- Allow participants to opt into groups based on comfort and interest
- Ensure each group has a facilitator or support person

Zoom Instructions: How to create breakout rooms

1. Start your Zoom meeting as the host.
2. Click the Breakout Rooms button in the Zoom toolbar.
3. Choose the number of rooms you want to create.
4. Select how you want to assign participants:
 - a. Automatically: Zoom randomly assigns participants.
 - b. Manually: You choose who goes into each room.
 - c. Let participants choose room: Participants can select their own room (if enabled in settings).
5. Click Create.
6. Once you're ready, click Open All Rooms to begin the breakout sessions.

Accessible communication

- Enable sign language interpretation
- Turn on live captions
- Encourage use of assistive apps
- Use tools like Miro for collaborative visual engagement
- Include descriptions of speakers and of visual content
- As a facilitator, use active listening techniques: paraphrasing, perception checks, and creative questions

Closing your meeting

Interactive Evaluation and Assessment

Use appreciative inquiry to ask attendees:

- “What went well?”
- “What gave you hope?”
- “What would you change next time?”

Offer anonymous feedback options and follow-up surveys in accessible formats.

Use tools like [Mentimeter](#) to gather feedback on:

- Have the attendees increased their knowledge?
- What could be improved?

- Can the attendees' network or find suitable peers for future collaborations?
- Would the attendees be interested in further training?

Also consider pre- and post-meeting surveys to track learning goals and outcomes.

After your meeting

Follow up and feedback

- Share a contact person for additional feedback or support
- Send a summary of the meeting, including key actions and next steps
- Provide access to recordings and materials in accessible formats, as well as graphic recordings
- Offer opportunities for continued engagement (e.g., mailing list, community group, follow-up sessions or additional training)

Resources and Tools

- [CBM Accessible Meetings and Events: a toolkit](#)
- [CBM Checklist for Virtual Meetings](#)
- [DCA Inclusive Meetings](#)
- [W3C Making Events Accessible: Checklist for meetings, conferences, training, and presentations that are remote or virtual, in-person, or hybrid](#)
- [Facilitator's Guide to Radically Inclusive Meetings](#)