

TITLE IX VIRTUAL HEARING FACILITATION CHECKLIST

A step-by-step checklist for Title IX hearing facilitation

Note: Many of these practices also apply to in-person hearing facilitation

BEFORE THE HEARING


Facilitator Role: Set the stage for a fair and well-coordinated hearing

PREPARE FOR THE PRE-HEARING MEETING

- Schedule pre-hearing meeting(s) **1–3 weeks before the hearing**
- Circulate **Zoom/Microsoft Teams link** and meeting date/time
- Coordinate with Hearing Officer on **meeting agenda and expectations**
- Be available to answer **logistical or technical questions** in advance

DURING THE PRE-HEARING MEETING

- Take notes** for the Hearing Officer/Decision-Maker
- Support the Hearing Officer with **logistics and technology** during the meeting
- Obtain phone numbers** for all participants to maintain contact in the event of technical issues

 *Tip: You may be asked to clarify institutional policy or process questions outside the scope of the hearing (e.g., supportive measures or access requests).*

BEFORE THE HEARING

Facilitator Role: Set the stage for a fair and well-coordinated hearing

AFTER THE PRE-HEARING MEETING

- Circulate Hearing Officer's notes** and/or clarifications to parties and advisors

1 WEEK PRIOR TO HEARING

- Identify witnesses who will attend the hearing** based on:
 - investigative report
 - witness lists provided by parties/advisors (if requested by the Hearing Officer)
- Prepare a **witness contact sheet** (name, email, phone number, preferred communication method)
- Share final witness list** with parties and advisors
- Contact and **invite witnesses** to participate in the hearing, including:
 - introducing yourself and reminding them of the Title IX hearing
 - providing general timeframes for testimony (e.g., morning vs. afternoon, two-hour blocks)
 - communicating expectations (confidentiality, private setting during testimony)
- Send Zoom/Microsoft Teams **hearing link to parties and advisors** (separately; include advisors on all communications)
- Remind parties/advisors of **pre-hearing submission deadlines**
 - 💡 *Example: deadlines for submitting written questions for the Hearing Officer*
- Invite investigator** to the hearing (if necessary)

BEFORE THE HEARING

Facilitator Role: Set the stage for a fair and well-coordinated hearing

3 DAYS PRIOR TO HEARING

- Send reminder** to parties, advisors, and witnesses with hearing details

1 DAY PRIOR TO HEARING

- Send final reminder to parties and advisors** (include Zoom/Microsoft Teams link)
- Send final reminder to witnesses**
- Confirm you have **access to the final investigative report** and evidence file (request access if needed)
- Prepare to share materials** from the investigative report/evidence file

 *Tip: Familiarize yourself with the virtual platform and be ready to provide technical or logistical support during the hearing.*

DURING THE HEARING

Facilitator Role: Manage logistics and support the hearing in real time

- Open hearing approximately **10 minutes prior** to start time
- Create breakout rooms** for each party and advisor
- Admit parties, advisors, and witnesses** to the hearing
- Mute participants** upon entry and disable certain chat features
- Start **recording the hearing** (required under Title IX)
 - 💡 *Reminder: If recording is paused for a break, ensure it is turned back on.*
- Introduce yourself and **state your role on the record** (and ensure all participants identify themselves and their roles)
- Set timing expectations** and communicate breaks clearly (e.g., “Break until 10:50 AM”)
 - 💡 *Tip: Place parties and advisors into breakout rooms before starting a break. Note that breakout rooms are not recorded.*
- Prepare to share materials** from the investigative report/evidence file
- Communicate with witnesses** in real time during the hearing:
 - When to join the hearing (email, call, or text per agreed plan)
 - Resend Zoom/Microsoft Teams link shortly before testimony
 - Provide updates if the hearing is running ahead or behind schedule
 - 💡 *Tip: Use your witness contact sheet to manage real-time communication efficiently.*

AFTER THE HEARING

Facilitator Role: Preserve the record and coordinate follow-up

- Save and securely store** the hearing recording
- Order **transcript** (if requested or required)
- Be prepared to receive **post-hearing submissions** (e.g., impact or mitigation statements)
- Share materials with the Hearing Officer** in accordance with institutional policy

QUICK REFERENCE: COMMON ISSUES



Unable to reach a witness

Document outreach attempts. Proceed based on available information and institutional policy.



Hearing postponed

Coordinate with the Hearing Officer, reset timelines, and reissue communications as needed.



Party does not attend the hearing

Consult the Hearing Officer and proceed in accordance with institutional policy.

This checklist is for educational purposes only. Actual procedures may vary by institution.