ZOOM TIP SHEET

TECH HOSTING

Registration, Preparation, Rehearsing, Orientation

BEFORE THE MEETING

USING ZOOM TO REGISTER

Benefits: Adding a registration component to your Zoom meeting allows you to gathering information from your attendees, brand your invitation, set up auto replies confirming registration and notify staff of new registrations. Zoom registration will also give you a report of attendance. Each registrant will receive a unique link to the meeting and they must use this link to join. For details on how to set up your registration in Zoom, please see their tutorial found here: https://support.zoom.us/hc/en-us/articles/211579443-Setting-up-registration-for-a-meeting

Challenges: There are some challenges with using registration within Zoom, as there can be issues logging on the day of the meeting. If you use Zoom registration, we recommend a co-host/tech person be available on the day to assist people struggling to enter the meeting. Make sure this person's email is shared in advance of the meeting so attendees know who to contact to troubleshoot joining the meeting.

DIY REGISTRATION

A less stressful option for registration is to ask your attendees to register via email with your church admin or through your website. The church office then can simply send out the same scheduled Zoom meeting link (and password if required) to everyone, as well as any other pertinent documentation to all those who have registered directly by email.

It is a judgement call based on the level of comfort your attendees have with their computers, using Zoom and the amount of support you will be able to provide to them on the day of the meeting.

TECHNICAL PREPARATION

- Create a technical script for your agenda that includes the details of spotlighting; screen sharing; related documents, participant management; and the verbal script for the chair. The more details you can gather related to presentations, etc. the more prepared you can be.
- Have a technical rehearsal for everyone in a leadership role and run through the technical script with everybody.
- Post meeting documents on your website, in addition to emailing/mailing them out. Then you can link to them in the chat at the appropriate time and save people from having to pull them up.
- Save a local backup on your computer of all documents/videos related to the meeting. It's not a bad idea to have these documents resident with more than one person in case someone has difficulty connecting on the day.
- Consider planning an orientation meeting for people to practice voting. It is easier to help people in advance than during the meeting when the technical people are doing other things.
- Determine in advance how you will use the chat. When participant chat is disabled, hosts and cohosts can post in the chat and participants can reply only to them. This is the setting we preferred at the regional meeting as a way to maximize the chat function in service of the meeting. If you want to allow a time for visiting in the chat you could open it during break times. Remember people on the phone cannot add to the chat and if they are only on the phone they cannot see it. So if there is something relevant to all participants in the chat, read it aloud.
- Detail the meeting opening, including when the host opens the meeting, the cohosts arrive, the waiting room opens and the call to order. Let your participants know when to arrive and what the arrival will look like (in the waiting room until they are let into the meeting just before it starts.)
- Breakout groups can be set up in advance if that pre-assigned option is preferred https://support.zoom.us/hc/en-us/articles/360032752671-Pre-assigning-participants-to-breakout-rooms
- Closed captioning is available in Zoom. This role can be designated by the host. We used National Captioning Canada, a company based in Calgary for our meeting.

DURING THE MEETING

LEADER'S COORDINATION

We found it useful to have a channel open where cohosts can communicate privately (Whats App group chat would work or texting).

MEETING ROLES

Note: The Meeting Chair who leads the agenda and chairs the meeting, is a separate role from the technical host. Assign the Chair as a cohost so they can access the chat and view the other meeting controls.

MEETING TECHNICAL HOST

- Opens the meeting
- Turns on recording
- Creates cohosts
- Shares presentation slides (we found it helpful to have an additional cohost to be responsible for sharing all video separately as this can be a job in itself)
- Spotlights speakers
- Set-ups and manages breakout rooms (cohosts can also manage breakout rooms in the most recent upgrade of Zoom)
- Designates closed captioner (if using)
- Manages security (chat/sharing/permissions about muting)
- Gives instruction if required to participants (unmute your microphone; turn on your camera, etc.)
- Turns on livestream (if using)

COHOST ROLES

These roles can be combined but unless people are very familiar with Zoom, we recommend one person/one role.

- **Greeter/Waiting Room/Email help related to meeting entry.** This person pays attention to the waiting room throughout the meeting and is available as the help desk for anyone who is having trouble gaining entry. If you are using Zoom registration then they need access to the account where the meeting has been booked so they can resend a registration link if necessary. Give the instruction in the meeting (and in advance) for people to contact them by email. Note you can disable the waiting room after the meeting has begun in the meeting security settings if you don't wish to manage entry throughout the time. Be prepared for participants to leave the meeting and need to rejoin.
- **Participant management.** This person helps turn off microphones that get turned on by accident; attends to the questions/comments in the chat (if participants are allowed to chat); adds instructions/links in the chat to documents, as required; watches for raised hands, etc. Can be delegated to offer one-on-one assistance if someone is having trouble.
- **Name Changes for Phone-In Participants.** If people are calling in via phone, you will need to change their phone numbers as they appear to their names in the Participants panel. Ask all people who phone in, one-by-one, what their names are. For example: "Someone has called in via phone on the number 416-123-4567. May I ask your first and last name so we may display your name in the meeting?"

- **Procedural Questions.** Identify a cohost who is available for procedural questions and points of order.
- **Screen Sharing.** As noted above, we found it worked to have the host share the PowerPoint presentations and another cohost share video. **Ensure *sharing computer sound and optimize for video* is selected**. If you turn these settings on once during a meeting they are retained, so it can be helpful to run a test before the participants arrive. It is also helpful to have all videos queued up and loaded (run them through once on your computer then restart).
- **Three Scrutineers for Voting.** Work out how many scrutineers you need related to which voting methods you choose. We used three: one lead who counts yes/no votes in Participants Panel, tracks and reports total to chair; one who tracks votes in chat and abstentions, one for votes by email.
- **Livestream Host**. If you are using a livestream component have a separate host to be present to those participants who is able to travel between both meetings using separate devices to avoid interference. If you have a long meeting, you may need more than one livestream host.

OPEN THE MEETING EARLY FOR COHOSTS AND PRESENTERS

- Send a message to the waiting room to let people know when the meeting will open.
- Rather than open with an informal reception time, it is simpler to leave people in the waiting room until 5 minutes before you start. Share a welcome slide while people are being let in from the waiting room.
- Keep all microphones muted upon arrival.
- You can admit everyone in the waiting room at once if you have had a chance to review the attendees in advance or you can admit them one at a time. You may need more than 5 minutes for a larger group if you want to admit one at a time.

ORIENTING YOUR PARTICIPANTS

At the beginning of the meeting take a few moments to review the Zoom screen with them, in particular the features you will use in your meeting. Adapt the sample detailed script in the Appendix. Here are the key points to cover:

- Keep your microphones muted and your videos off unless you are presenting/speaking;
- How the chat is being used;
- Review the screen options: switching in and out of full screen, speaker and gallery view;
- Review the voting, speaking and point of order procedures;
- How to participate on the phone (*6 mute/unmute; *9 raise your hand);
- Let people know what help is available.

SAMPLE SCRIPT FOR ORIENTING PARTICIPANTS IN THE MEETING

(Offer instructions live, slowly and clearly. Keep it light-hearted to encourage folks and dispel anxiety. This is the exact script we used in our regional meeting; please customize it to suit your community and your meeting. Using a script helps to ensure the instructions are simple and clear.)

Welcome friends, all of us on the learning curve using Zoom. I'm going to review the tools that we are going to use in the meeting today.

First things first – write this down – old school on a piece of paper if you've got one, <support person's email address> that's <name's> email.   <Cohost name> can you post that in the chat please. If you lose the meeting or get kicked off the internet and can't get back <she/he/they> will help you. If you email <her/his/their> for help, add your phone number and your name so <she/he/they> can also call you back to talk you through the help. It's important to remember that there is only one door for this meeting (note: only if you are using Zoom registration). The only way to re-enter today is through the link that was emailed to you. So if you get disconnected or if you leave, you have to go back through that channel to return, try that first before contacting <name>.

ZOOM TOOL BAR

Let's have a quick look at the Zoom tool bar, the black bar at bottom of your screen – this is your menu bar for the features that are available in this meeting.

*NOTE: If you are calling in by phone, the only functions you will be able to use is *6 to mute and unmute your microphone and *9 to raise your hand.*

Microphone

First is your microphone, the red line through it means that you are muted. We ask you to keep it that way to keep our background noise at home. If you are presenting or it's your turn in the speaker's queue, the Chair will ask you to unmute your microphone before talking and then you can turn it back off when you are done. Sometimes this transaction can take a few seconds so we need some patience to get everything lined up. If you're having trouble unmuting <meeting host> will send you a prompt to unmute and that should help.

Camera

The next icon is a video that turns on your camera. We're leaving cameras off except for those presenting, to save bandwidth and minimize distractions. When it's off 'you' still show up on the main screen in a little rectangle, with either your picture, if you've added one to your Zoom account profile, or your name. Here's a next level up tip: once

you've turned your camera off, you can hide all other non-video participants from a little menu that's in your onscreen profile in the main meeting space. There are three dots on the corner of your name on the screen and when you open that there's a choice to hide non-video participants which means you will only see on your screen the active players in the meeting and that can be a less distracting view for you. In Zoom, whenever you see three dots it means there is a menu there. Don't worry about that if you can't find it.

Attendance (if you are livestreaming)

A word about attendance. This meeting is happening simultaneously in two different places. Voting members, presenters and staff who have pre-registered are in a Zoom meeting, and participants who wish to observe, take in the presentations and conversations are watching on YouTube. YouTube participants are able to comment and there is a host who is participating in that stream, however the YouTube comments will not be relayed back into the meeting in real time. They are two separate gatherings.

Participants Panel

Back to the Zoom toolbar on your screen, you want to find the Participants icon – this opens the Participant's panel -- a very important tool for this meeting. Click on it and notice it open and close, on a panel to your right, if you're viewing on a computer. Here is the list of everyone who is attending today. You should see your name at the top of the list and then the host's name and then the names of everyone who is unmuted, and the names of those muted.

Rename

Go to your name on the panel and ensure it is accurate with your first and last name. You can rename yourself by clicking on your name and then the More button that appears, followed by Rename. You can add your pronouns here. If you are a corresponding or non-voting participant today, we ask you to add a "Z" in front of your name, to help the scrutineers when it comes to counting, as this will push your name down to the bottom of the list. If you are calling in to the meeting by phone, the host/cohost will ask who is at your number and ask for your first and last name so they can add it to the bottom of your square.

Speaker's List

The second way we are going to use the Participants panel is to keep track of our speakers list. In our gathered meetings when you wanted to speak you would line up at the microphone and wait to be acknowledged by the Chair. In this meeting the way to get in that virtual line up is to raise your virtual blue hand at the bottom of the panel – don't raise or wave your real hand – unless you are signalling for someone at home to bring you some tea. The blue hand is the first icon down there in the Participants panel,

the row at the bottom of the names – when you find it, raise your hand and see how it appears beside your name.   Cohosts are monitoring the panel and will keep the Chair informed of the list of speakers as you come forward. When the Chair calls on you, unmute your microphone and you will have <90 seconds> to speak. You don't need to lower your hand we will do that for you. Give it a try and see how it looks. If you are participating on the phone raise your hand by pressing *9.

Chat

The chat box is the next icon along your Zoom toolbar. Click it to see the panel open. You can drag it around on your screen if you like, that only changes it for you.   If you have it closed you will see a little notification on the toolbar. When there are messages in there a number will appear on top of the icon on the toolbar. We have limited the chat in this meeting so that you can only chat to cohosts as a way to minimize distractions and in order to use the chat as a tool to facilitate the meeting. Everyone please open the chat box. At the bottom of the box there is a label after where it says TO: where you can choose the recipient of your message. If Everyone is not available you are able to chat with one of the cohosts. Choose <cohost name> and type in your name, which gives us a quick roll call. If you have technical questions reach out to <cohost name> and ask <cohost name> procedural questions. Remember that after you type in what you want to say in the message box, you have to hit enter on your computer keyboard to send your message.

If at some point during the meeting you wish to raise a point of order, please raise your hand and type PT OF ORDER in the chat box and send that message to <cohost>. <Cohost> can you type that in so we can see it please, and the Chair will adjust the speakers accordingly. If you are on the phone, you may raise your hand for a point of order by pressing *9.

Voting

The next icons I want you to see are on the Participant's panel. They are the green and red Yes and No buttons in the same row as the raise your hand icon. We are going to use these Yes and No buttons to vote, and we will practice that it in a minute.

If you wish to abstain from a vote, please type ABSTAIN in the chat box. If you have an amendment please also use the chat box to type it in.

There will be a separate round of voting for those who are participating on the phone and you will be asked to use *9 to raise your hand at the appropriate time. Don't worry about lowering your hand, we will do that for you.

When the host shares their screen with a proposal, the program may put you into full screen mode and you might lose the chat and participant panels. To get these back click 'Chat' and 'Participant' on the Zoom toolbar (usually at the top of your screen when sharing is turned on). They will reappear in the centre of your screen but you can move them to the side by clicking on the top of the pod and dragging it over.

Recording

Please also note that this meeting is being recorded for our own documentation and to make presentations available later.

Closing

If I've overwhelmed you with instructions – type bamboozled in the chat – just kidding -- you can reach out to cohosts in the chat and we will try to help. But if you get stuck – just email <cohost> that's what I always do with good results.

Now I will give it back to <chair> who will take us to the test vote on the very important issue before us, the motion being: *It has been suggested that all future meetings should involve a Skip the Dishes delivery of coffee and muffins.* Please, as tempted as you may be to weigh in, only those with voting privileges should do this test vote and we need everyone who can vote to do so, when the Chair calls the question.

Proceed to a test vote where the Chair puts the question and calls for the level of voting using the Yes/No Buttons and on the phone.

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