ZOOM TIP SHEET

TECH HOSTING

Registration, Preparation, Rehearsing, Orientation

January 28, 2021 Based on Zoom Version 5.4.9.

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
- There are two captioning options in Zoom. You can pay a service to do live captioning. (We used National Captioning Canada, a company based in Calgary for our meeting.) Or the built in automatic captioning in Zoom can be turned on. It is not 100% accurate but it can add a layer of audio support, for no additional cost. Participants can toggle it on/off themselves.

<u>DURING THE MEETING</u>

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 a person)
- 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. If a cohost is playing a discrete role add it to their name in the display, i.e. HELP Donna, or SPEAKERS Jody.

- **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 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.

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