

# A Suggested Checklist for Organizing Zoom Meetings

(by Barry McWilliams - Seattle Storytellers Guild)

## Prior to Meeting planning decisions

1. **Will it be a Zoom Meeting or a Webinar?** *Meetings allow much more interaction between hosts and the audience. Attendees at Webinars will not be seen or heard and are limited to the chat box.*
2. **Are donations going to be requested or tickets going to be sold?** How will this be handled?
3. **Who will be Hosting the Program?** *Zoom meetings are best with three “hosts” - The Zoom or Tech Host, and an Emcee who interacts with audience and speakers. A Co-Host is usually needed to assist in admission and monitoring the Participants Panel.*
4. **Who will be included the Program? Will the program be one featured teller, or an Olio?** Who will make the arrangements with the Storytellers or Speakers?
5. **How will links to join the event be shared – by email, within social media, or in response to Email requests?**
6. **Will registration be required?** *If it is to be made public, published or posted on social media or a website, or a Webinar, registration is recommended. It gives more opportunity to connect with those attending.*
7. **How will the chat be used?** *Some Producers prefer to discourage chat posts to avoid distractions during a story telling. Others like the live feedback. Background Information and contact about presenters and other announcements ought to be prepared ahead of time for cutting and pasting.*
8. **Will screen sharing be used?** *What will be shared and who will share it? Donation Tip Jars and Announcements are often presented visually.*
9. **Will the event be recorded?** If so, how and with whom will it be shared after the event?
10. **Will the Program be Live Streamed?**
11. **Will you need to use breakout rooms, polling or other features?**

## Scheduling a Meeting

1. Take note of the **Recommended Settings** for meetings.
2. Use a **Unique random meeting ID and passcode**, not your personal one.
3. Schedule it as a **Registration Meeting**, especially if the link is to be shared on Social Media with the Public. *These are both a practical and security considerations, since we want to make sure our desired audience has easy access, but access is restricted as much as possible to the desired audience to prevent unwanted interference. With Registration, attendees will sent the link to join, you will know who intends to come, and you can create email lists for future contact. And you can send out reminders and follow ups.*
4. The creation of a **shortened shareable Link** – such as **Bit.ly** <https://bitly.com> is helpful. And use the + sign to avoid “phishrs” which have learned how to scam Tinyurl . (See <https://safecomputing.umich.edu/be-aware/phishing-and-suspicious-email/shortened-url-security> ) *Then paste the shortened links into an Email with more about the event. If sending that to a Email List of people – send a copy to yourself, then, please, paste their addresses into the bcc: to avoid sharing email addresses with others on the list.*
5. **Get additional Information from the Storytellers** – Web links, media materials, additional announcements they would like you to share.
6. **Publicity will be mostly online using social media.** *Encourage people to share it around. Send out emails. Attractive eye catching ads should be created Be aggressive in posting these ads, especially close to the date of the event. Experience shows that 20-30% of those come register within 24 hours of the event. With Facebook, include the connection link in the comments, not just in the graphic! Test and beware of typos.*

## Pre-Meeting Setup and Testing

You may need to **Update the Advanced Settings** and **Customize the Waiting Room**.

Make sure all hosts and featured participants have updated the Zoom app on their computer or device they will use in the meeting to the latest version. **Communicate the “Rehearsal” or Pre-start sign in times** to all involved.

1. **At least 30 minutes prior to the event starting time** - have the **Tech Host, Emcee Host**, any other **co-hosts** and **any featured Tellers** sign into the meeting and check their Audio and Video settings. Deal with any questions regarding the order of the program, etc. Then give them a brief break.
2. Check that the **Tech Host** who is controlling the Zoom session is listed as Host in the **Waiting Room/ Participant** panel and that any co-hosts are listed as such in the Participants window. The host will need make them co-hosts. Hint: *Rename speakers with an \* (asterisk) in front of their name, or make them Co-hosts as well so they will appear at the top of the Participants panel.*
3. **Prepare the “Script”!** Have the **Emcee** clarify the order of program with all those in it. Add to this written “highlighted” notes on who to Spotlight and when, when to share screens, etc. Distribute copies of this to all the hosts and speakers and have hosts print it out and add highlights.
4. It is helpful, for the Host to **print out a list of Registrations** earlier in the day of the program and share this with the other hosts. *You can be certain however, that usually at least 20% of those joining the meeting will register just prior to the event and won't be on your earlier list. If you are noting attendance, write down their names – they will be on the Registration list after the event.*
5. *Prepare and have ready any **Graphic images, or Powerpoint presentations** which might be used or shared during the program.*

## Starting and Ending the Meeting:

Experience has shown that **Zoom Programs and Swaps are best with several “hosts”** - A **Tech Host** schedules and sets up the ZOOM meeting, starts and ends it, and Spotlights people during the program while monitoring the Waiting Room / Participant's Panel. We find it is best to have the assistance of a **Co-Host** with the latter. The other host is the **Emcee Host** who interacts directly with the audience, welcoming them and running the program, introducing the tellers, encouraging “applause” and interaction afterwards.

6. **Generally 15 Minutes before the Start Time of the Program** the **Tech Host and Co-Host** should start admitting people from the **Waiting Room** to give them time to get connected. The **Emcee Host** should offer greetings as people join, etc. and the hosts can remind people to turn on their **Video** and **Mute** or **Unmute**,
7. The **Co-host** should continue **admitting** and watching the **Participant's Panel** for issues, while the **Tech Host** is tends to other matters – **Live Streaming, Recording, Screen Sharing**, etc. *There is often a lag time in starting Live Streaming, and it is easy to forget to start Recording as well.*
8. It is helpful for the **Tech Host** to have separate windows already open for screen sharing and with Chat items for pasting. At least have the files readily available at the bottom of the screen.
9. End the **Recording** at the end of the actual program, and any **Live Streams**.  
If recording to the Cloud – you will be sent information on how to download the Video, Audio and Chat files. You will also be given a link and passcode to send to someone who might wish to view the recordings.
10. Be sure and Save the **Chat** – copy it into your word processor and edit it for sharing, if desired.
11. Open your **Registration Reports** and save the final list of Registrations. It is a good practice to email your guests and Thank Them for coming, include announcements, Teller info and contacts, etc.

## A Suggested Division of Zoom Hosting Tasks

- ◆ **The Emcee** welcomes people, and encourages banter and conversation until the Host are ready to start while endeavors to get things started on time. *However, the **Emcee** should not start until the **Tech Host** indicates he is ready – i.e. any recordings and live streams have started.*
- ◆ **The Emcee** should remind people to **mute** and not **chat** while stories are told; and recommend they switch to **Speaker View** for telling and **Gallery View** for group discussion. If Tellers are **Spotlighted**, people will need to be reminded to return to **Gallery View** afterwards.
- ◆ **The Emcee** host may want to show people where or how to applaud and react.
- ◆ **The Emcee** should introduce the speakers, just as in a live program. *A moment to gather their thoughts.*
- ◆ **The Emcee** should make an effort to point out the **Tip Jar** or other ways to make donations
- ◆ Either **the Emcee** or **Tech host** can make and share announcements and people should be reminded on how to save their Chat at the end of the Program.
  
- ◆ **The Tech Host and a Co-Host** should always keep an eye on the **Waiting Room/ Participants Panel** and **Chat Box**, and admits people to the meeting.
- ◆ Only the **Tech Host** can **Start** and **End** a meeting for all. Most other actions are permitted to the **Co-Host**.
- ◆ The **Tech Host** starts **cloud recordings**, and any **Live Streams**.
- ◆ The **Tech Host** may rename participants or ask them to rename themselves. *(Hint: Renaming those to be spotlighted with an asterisk before their names keeps them at the top of the list)*
- ◆ The **Tech Host** may **Spotlight** Tellers and may **Mute all** (the teller will need to **unmute**) and may also **shut off Chat** during the telling of stories.
- ◆ The **Tech Host** should monitor the Chat, and paste or share announcements at appropriate moments.
- ◆ **The Tech Host** may be **Screen Sharing** during the program – donation information, announcements, etc.
- ◆ The **Tech Host** and **Co-host** should be aware of late arrivals, and potential issues, such as low bandwidth or unexpected background noise. *And sometimes they have to field phone calls or emails from people having problems connecting or who lost the meeting link.*
- ◆ The **Tech Host** may give recording permissions to individuals – generally this is discouraged.
- ◆ The **Tech Host** should be very familiar with the toggling options in the Security Tab and how to deal with disruptions.

## Recommended Security Defaults in Zoom Meeting Settings.

### Make sure the following are Off

- **Participants video** (You may also want to turn off Host video, then turn it on in-meeting)
- **Join before host**
- **Annotation**
- **Remote control**
- Allow removed participants to rejoin
- Use a Personal Meeting ID (PMI) when scheduling a meeting, but use a random generated meeting Number and Passcode for the event.

### Make sure the following are On

- **Mute participants upon entry**
- **Allow host to put attendee on hold**
- **Screen sharing with Host Only** selected
- **The Waiting Room** should always be used - it is a default setting! Customize it with a Logo and info about the program.