



GWN guidelines: Zoom events

Background

GWN's delivery of online events began while the country was in lockdown for Covid-19. We saw a need to keep our membership connected and deliver on our work programme, so we chose Zoom to help us bring our events to members across the country.

Zoom was chosen because it gave GWN good flexibility for delivery and access for attendees and offers a 'seminar' function which we anticipate using for larger online events. The software has been vetted by DIA and other agencies and GWN performed due diligence with these agencies to ensure it was acceptable for use in our work.

Licenses

GWN holds three licenses for Zoom: one for Wellington, one for Auckland GWN and one for Southern GWN. We expect to purchase temporary Zoom seminar add-ons on an as-needed basis.

Small to medium events

With our 'Pro' license, we can hold an unlimited number of events for up to 100 attendees for a maximum meeting duration of 24 hrs (for any one meeting). These licenses (one for AGWN, one for SGWN and one for GWN's Programme office) allows us to record our meetings and manage attendees with extra features such as encryption and notifications. Having three of these licenses means that we don't have to worry about events overlapping in the different GWN regions.

Large events

If we expect to have more than 100 attendees for an event, we can purchase a 'Zoom Seminar' license add-on. This add-on enables more features and options and can be purchased on a month-to-month basis.

Event set up

Within Zoom

GWN's main account has some options for set up selected by default. These include:

- Waiting room for anyone not hosting the event
- Passcodes are required and are embedded in our invitation links
- Co-hosts can be assigned and have the same privileges as hosts; all hosts can report objectionable attendees

- Video for participants is off by default
- Polling is enabled (available to hosts)
- Chat rooms and private messages within chat rooms are enabled
- Screen sharing is enabled for everyone (host can override); hosts can annotate shared screens
- Meeting reactions, breakout rooms and virtual backgrounds are enabled
- Attendees can rename themselves in meetings
- Participants can join from a browser and bypass Zoom download (some functions are unavailable from the browser experience).

Custom options for events/meetings:

- Ensure there is more than one host for events with people outside our organisation. Hosts can be anyone, but externals can only be selected as host from within the event interface.
- For events over 20-25 people, switch to 'speaker view'; from the view options, choose 'pin video' for main speaker(s) to ensure their video remains at the top of the view panel when they switch to screen sharing mode.
- Consider enabling 'mute all participants on entry'
- Consider disabling screen sharing for all but hosts
- If appropriate, consider enabling 'live streaming' of a meeting
- If recording, ensure that the user recording the meeting has optimum set up of view options to be reflected in the recording.

Prep the event

Volunteers

- Depending on the size and nature of the event, you will need 3-5 volunteers to deliver the event to a professional standard. All volunteers can be made co-hosts. Some roles can overlap because not all functions will be performed at once. Roles include:
 - **GWN host** – oversees all roles and ensures they can step in if required
 - GWN host should be the one who records the session and maintains the optimum view options throughout the recording of an event. Note that breakout room sessions are not recorded except where a Host is present in the breakout room. Recording should be paused while breakout rooms are active, otherwise recording in main meeting room will continue during breakout sessions.
 - GWN hosts should provide the auto-saved chat room text from their computer to share on the GWN website (*NOTE: private messages from your account to the chat room will also be recorded but can be edited in the TXT file*).
 - **IMPORTANT:** because the Host is recording the event, it's highly recommended that they are using a hard-wired connection to broadband rather than wi-fi to ensure signal stability.
 - **Co-host (1-4)** – backup for host and can manage attendees
 - Co-hosts admit attendees from waiting rooms and can remove unwanted participants
 - Co-hosts can mute attendees who are noisy



- Co-hosts may be 'on call' with their cell phones to assist anyone having trouble joining the event.
- **Waiting room manager (1-2)** – checks attendees against event ticket list and admits attendees; this role is crucial for event security; may need to advise attendees how to change their name or add an agency name to their name label
- **Chat room manager (1-2)** – keeping an eye on chat room conduct, able to privately message attendees where needed, can pass questions or responses on to speaker(s) and/or host. Often these people will need to know how to advise attendees on participation (private messaging, reactions, view options, etc.). Chat room managers do not necessarily need to be co-hosts.
- **Video manager** – if video is required as part of a presentation, this is best done from a separate participant to the main speaker to avoid problems with audio. *Videos should not be embedded in Powerpoint presentations.* Best (most reliable) practice is to download the video to play from the computer not the browser, ensure Presentation file manager has stopped sharing their screen before Video manager shares screen, and ensure sound sharing is on.
- **Presentation file manager** – Manages the slide presentation for the speaker. If the speaker is more comfortable doing this, they are welcome to, however, be aware that this can affect the quality of the video recording as the speaker will be somewhat distracted and won't be camera-facing. *Note that PDFs are preferable to Powerpoint presentations as they require less computer power and are more straightforward to display.*
- **Breakout room manager** – This person sets up the breakout rooms – easiest way is to automatically assign attendees to breakout rooms based on the preferred number of participants. You can then reassign event hosts and volunteers to a manually created room for private discussion. When breakout rooms are in use, video recording should be paused. *Breakout room sessions can be recorded, but only for the participants in the room.*
- **Poll manager** – If you're using polls in your event, the poll manager would have questions and answers pre-prepared in the poll to avoid delay. The Poll manager would also record the poll results (screen grab) and manage 'sharing' poll results.

Event timings and dry-runs

- Dry-run(s) of the event within Zoom with volunteers and presenters are highly recommended a week to 10 days before the event to ensure seamless delivery on the day.
- Set your event time to start 15 minutes (or more, depending on the size) before the speaker starts their presentation. This allows time to admit everyone into the meeting room according to our security protocols.
- The event should be created in your GWN Outlook calendar with name, date, time and volunteers, hosts and presenters invited to join. Before sending the invite, click 'create Zoom meeting' to add the event to our Zoom meeting list in our main account.

Listings and registration

- Eventbrite for a GWN Zoom event is set up as a normal (not online) event. For extra security, the Eventbrite listing must be made 'private', with a password to view the listing.



Zoom links and passwords for the event are added to confirmation email and the event tickets, NOT the description of the event itself.

- In the ticket and confirmation emails from Eventbrite, be sure and remind attendees that their Zoom display name should be the same as their Eventbrite registration so we can admit them from the waiting room. You may wish to include this in Eventbrite's reminder emails as well.
- The event should be listed on the GWN website event page but Zoom links and passwords should be kept private. The event listing should link to the Eventbrite listing.

Post-event prep

- Prep the post-event survey questions and share with GWN Programme Office.
- Identify an attendee who can write a summary of the event within a week after the event has finished. This will be shared on the GWN website. Be sure to include screen grabs or other images relevant to the event and include any materials that can be shared from the presentation.

Promotion

- Promotion for Zoom events is generally handled as any GWN events are – via our newsletters, the GWN website and LinkedIn.
- It's essential we avoid the possibility of event interlopers or trolls, so we always use passwords for Zoom and Eventbrite listings. *The details of our online events can be shared, but where possible, the Zoom link and password should only come from Eventbrite.*
- All GWN online events are recorded. Your Eventbrite listing should make this clear to people before they register for tickets.
- Consider the anticipated attendance [(attendee list + waiting list) – 30%] before your event to gauge how much work is involved in managing the event and scale your promotion accordingly. Where appropriate, your waiting list can be expanded or reduced to accommodate.

At present, we can confidently host events of up to 80 people with these guidelines. Events with more attendees may need special conditions, more volunteers or other factors to be considered beforehand and promotion will be scaled to accommodate.

Event management on the day

Start time; waiting room

- Plan for hosts and volunteers to turn up 15 minutes before you expect guests to arrive to check-in and gather your thoughts.
- Your attendees have been invited to join 15 minutes prior to the event start time to allow time for waiting room management.
- Chat room managers are encouraged to 'warm up' the room with greetings and commentary. Keep in mind that people can only see chat threads from the point they enter the room.



Documenting the event

All GWN Zoom events should be recorded. The recordings will be made available to the wider GWN audience after the event, and transcripts and captions will be produced. The video will be shared in our YouTube channel. It's important to ensure that the speakers have given their permission for the event to be shared in our channels.

Chat sessions are automatically saved to your computer after the event (search 'Zoom' on your computer to find the Zoom folder where these are saved). Note that chat sessions should be saved from the GWN Host's computer. Chat transcripts will be edited where appropriate.

Screen grabs from the Host computer (with optimum screen layout) should be made of the live event. These can be shared in our various comms channels.

Special features

Breakout rooms – These are not required for every event and may not be feasible depending on your volunteer capacity. Breakout rooms require much attention and are time sensitive. Assign your most seasoned Zoom user to manage the breakout rooms and ensure breakout room management is included in dry-run sessions.

Polls – Polls are fun and a fairly low-stress way of getting participation from attendees. They are temporary, though, so you may want to make screen grabs of poll answers as they disappear once they are finished and shared. 'Re-opening' poll questions does not reload previous responses.

Troubleshooting

Hopefully your dry-run events will help you address any issues in advance of the event. But if not, here are some tips:

- Encourage any volunteers who are relatively new to Zoom to watch some of their [tutorials](#) before the event.
- Be sure you have a seasoned Zoom event person on hand to help troubleshoot on the day.
- One or two Co-hosts should be available by phone if attendees are having trouble.
- For serious issues, you can try to contact a GWN team member to help if necessary.
- For issues with connectivity, try asking attendees to disable video to free up bandwidth.

Please share any troubleshooting tips you learn from your experiences with the GWN team so we can update these guidelines.

Wrap up

After attendees have left, it's a good idea for event organisers and speakers to hang back and share your initial thoughts and impressions in the meeting room. Share your thoughts on what went well, what you learned and what you can do better. Make notes of troubleshooting issues so we can investigate solutions. Also make a record of any general concerns you may have for online events and what steps you may be able to take to address or avoid them in the future.



Post-event

De-brief

After the event a more formal de-brief can be conducted. If you have received comments or feedback from the speakers already it's not essential they be involved. Although you may have done an informal download of impressions in the meeting room after the event, there is benefit in conducting a more structured event de-brief to gauge the event against its goals, success measures, budget requirements, attendee expectations and also to share and evaluate event survey feedback.

Event survey

GWN uses Survey Monkey to conduct post-event surveys. The survey should go out promptly after the event (the same day if possible). We have a base set of questions and other questions can be added according to your needs. Please review the question set with the GWN Programme Office before making the survey live.

Event summary

Share your draft summary of the event with the GWN's Communications Advisor. Include the chat session file, high quality images and other materials from the event that can be shared. This will eventually be posted on the GWN website.

Event recording and accessibility

The event recording will be edited for posting on our website and YouTube channel. The best way to send the video to us is by sharing a Dropbox or We Transfer link. Be sure and provide correct spelling of speaker(s) names, titles, organisations and any links or logos they want to include.

Please provide a written transcript of any Māori language used during the event and indicators of where it has been used. GWN's Communication Advisor will arrange for captions and transcripts to be produced.

Thank yous

We like to acknowledge our speaker(s)' and volunteers' participation by formally thanking them. All event volunteers and presenters should receive a thank-you email. Volunteers may receive a physical thank-you card if you like. It's entirely appropriate for speakers to receive a small gift to show our thanks, but GWN doesn't have the budget to be extravagant. Please keep your thank-you gestures under \$20.

