# Guidelines and recommendations for Zoom events

## Background

Zoom is a useful tool for communicating remotely and staying connected. Besides having online meetings, you can deliver events remotely across New Zealand. It offers a webinar function for hosting larger online events with good flexibility for delivery and access for attendees. 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. You may want to check with your agency technical support to see if Zoom meets security requirements for your agency.

## Licenses

Zoom’s free license will be suitable for smaller, short events (40 minutes or less). We recommend purchasing a Zoom license if you or your organisation doesn’t currently hold one.

### Small to medium events

* With a ‘Pro’ license, you can hold an unlimited number of events for up to 100 attendees for a maximum meeting duration of 24 hrs (for a single meeting).
* A Pro license allows you to record meetings and manage attendees and includes extra features such as encryption and notifications.

### Large events

If you expect to have more than 100 attendees for an event, you 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 or as-needed.

## Event set up

### Within Zoom

Your account can be set up with some options selected by default. GWN’s default settings include:

* Waiting room for anyone not hosting the event
* Passcodes are required and are embedded in 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).

### Recommended 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:
	+ Host – oversees all roles and ensures they can step in if required
		- The Host should be the one who records the session and maintains the optimum view options throughout the recording of the 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.
		- Zoom automatically saves chat room text from to your computer which can be shared later to post-event channels and for accessibility and event video content continuity *(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 recommended security protocols.

Listings and registration

* If you’re using Eventbrite for event ticketing and promotion, you may prefer NOT to set up your Zoom event as an Eventbrite ‘online event’. For an extra layer of security, we recommend the event listing be made ‘private’ with a password to view the listing. Add your Zoom links and passwords for the event to your event confirmation email and the event tickets, NOT the description of the event itself (or there will be no reason to get tickets).
* In the ticket and confirmation emails for the event, you may want to remind attendees that their Zoom display name should be the same as their event registration name so you can check them against the approved attendees list and admit them from the waiting room. You may wish to include this in event reminder emails as well.
* If you list the event on the GWN website event page, make sure the Zoom links and passwords are kept private.

## Promotion

* To avoid the possibility of event interlopers or trolls, we recommend using passwords for Zoom and Eventbrite listings.
* If you’re recording your event, we recommend that you inform registrants in your event description before they get 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.

GWN has confidently hosted 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 should 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 and iron out any wrinkles.
* Ensure 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

Event recordings provide the opportunity for events to be made available to a wider audience after the event, with transcripts and captions added. It’s important to ensure that the speakers have given their permission for the event to be shared on your channel.

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). Chat sessions saved from the Host’s computer will likely be the best version to use as the Host will be keeping an eye on many event factors. Chat transcripts can be edited where appropriate, though we recommend keeping the public chat record intact.

Screen grabs from the event can be for sharing in 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 your 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](https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-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, a person with technical knowledge should be on standby and 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 you 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 summary

We encourage you to provide a summary of the event to GWN where appropriate and we can share that on our website and newsletter channels.

### Event recording and accesssibility

If your event has been recorded and can be shared, we highly recommend it to expand the reach of your event impact, skill-building, insights and messaging. GWN can add this to our YouTube channel if you’d like it to have wider reach.

As diversity and inclusion champions, accessibility is extremely important to GWN and we have prioritised providing captions and transcripts of our events where resourcing allows. It’s a good idea to request a written transcript of any Māori language used during the event and indicators of where it has been used. If you have Māori advisors in your agency, we recommend checking caption text with them to ensure accuracy and respectful transcription.