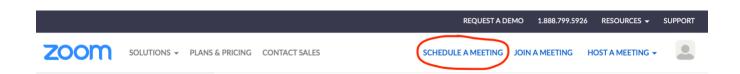# How to...
Facilitate a Zoom meeting

This guide is organized into three parts: Booking your Zoom meeting, Planning your Zoom meeting and Running your Zoom meeting. We've also included an Appendix at the end with some security functions and other helpful tips.
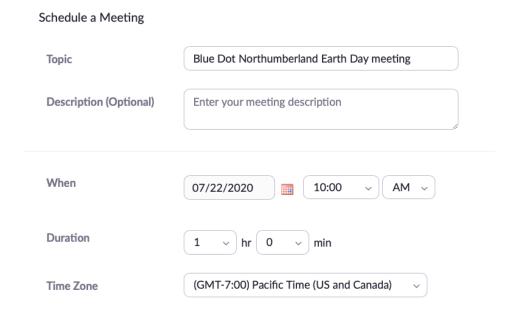
Booking your Zoom meeting

1. If you would like to use a Future Ground Network Zoom account, please fill out this access agreement at least a week in advance of when you would like to use the account.

2. Sign in to Zoom here using the log-in information provided.

3. Click "Schedule a meeting" in the top right-hand corner of the window.

4. Fill out the details of your meeting and make sure the time zone is set correctly.

Schedule a Meeting

Topic	Blue Dot Northumberland Earth Day meeting
Description (Optional)	Enter your meeting description

When	07/22/2020 🗓 10:00 ⌄ AM ⌄
Duration	1 ⌄ hr 0 ⌄ min
Time Zone	(GMT-7:00) Pacific Time (US and Canada) ⌄

5. Determine the following meeting settings (**for security tips, see Appendix A**):

a) Check the registration "required" box to make sure your meeting stays secure.

b) If you want to suggest that participants turn their video on, you can click "on" for participants as well as for the host. Your meeting participants will still be able to turn off video if they want.

c) Checking "both" for audio allows participants to join by phone if they don't have a strong enough internet connection or are experiencing technical difficulties. You can edit the "Dial from" option depending on where your participants are located.

d) Enable a "waiting room" so you can screen participants as they join to make sure you know who is accessing your meeting space. This means the host will have to grant permission to participants joining. These notifications will pop up on the call.

Registration	☑ Required
Meeting ID	◉ Generate Automatically ○ Personal Meeting ID 791 389 6722
Security	☑ Passcode [Future] ☑ Waiting Room
Video	Host ◉ on ○ off
	Participant ◉ on ○ off
Audio	○ Telephone ○ Computer Audio ◉ Both
	Dial from Canada Edit
Meeting Options	☐ Enable join before host
	☑ Mute participants upon entry 🔏
	☐ Only authenticated users can join
	☐ Record the meeting automatically
Alternative Hosts	[Example: mary@company.com, peter@school.edu]

Save   Cancel

6. Click "Save." Once the meeting is set up, you can invite people by copying and pasting the "Registration URL" or clicking "Copy the invitation" to have Zoom generate a standard invitation message that you can copy and send.

Registration Link   https://us02web.zoom.us/meeting/register/tZIvdO6tpjstHNAh1UZWoHkvofj6VDULa7rT   ⧉ Copy Invitation

Copy Meeting Invitation   ✕

Meeting Invitation

Hi there,

You are invited to a Zoom meeting.
When: Jul 22, 2020 10:00 AM Pacific Time (US and Canada)

Register in advance for this meeting:
https://us02web.zoom.us/meeting/register/tZIvdO6tpjstHNAh1UZWoHkvofj6VDULa7rT

After registering, you will receive a confirmation email containing information about joining the meeting.

Copy Meeting Invitation   Cancel

7. When you send the initial meeting invitation, ask if anyone has access needs they would like to share in advance. That will give you a better chance of being able to accommodate them and to reduce barriers to access right away. People whose access needs often go unmet in online spaces have no reason to assume their needs will be met in this space, unless you make that clear in advance.

4

Planning your Zoom meeting

Materials:
- Send the Zoom link (**including call-in options**) and **agenda** at least an hour before of the meeting (and make sure you tell people in advance when it will be sent out).
- The agenda and meeting invitation should highlight any **content warnings** (e.g., racism, ableism, sexual violence) so folks can make informed decisions about whether/when to participate.
- If you plan to address slides or other audio-visual materials like a YouTube clip or article during the meeting, send those in advance as well. This will help reduce barriers to access.

Roles:
- One or two facilitators (so you can trade off for longer meetings).
- Minute-taker(s).
- Tech support. (For larger meetings, it may be necessary to help answer tech questions in the chat, and to share screens or take people on/off mute.)
- Accessibility point-person.
    - Identify this person at the start of the meeting and provide options for contacting them directly during the meeting. If you're gathering access needs in advance, put them in touch with those who express needs before the meeting starts.
- Captioner(s)
    - Google Meet has free captioning.

Design:
- Be flexible with your agenda! Put more urgent items near the start and include some time at the beginning for folks to get set up on Zoom and adjust to the online space.
- Plan for a shorter meeting than if you were meeting in person. Screen time is exhausting!
- For meetings longer than 1.5 hours, build in time for a **five- to 10-minute break** so folks can stretch, get a snack, use the bathroom, meditate, etc.
    - You could offer an optional guided stretch/meditation/dance party/other activity during this time. Make sure it's inclusive of a range of abilities.
- Build in time to make the meeting accessible in an audio-only or visual-only format. **See *Running your Zoom meeting* section below for details.**
- Don't assume everyone will have high-speed internet, camera access, etc. Don't rely on live-streaming capacity. Try to share content in advance, and always have alternatives in your back pocket!
- Consider whether you need captioning for deaf or hard-of-hearing participants.

- Apps such as Otter.ai or Thisten can help generate transcripts from audio. They can also be integrated with Zoom conferencing.
- For more tips on how to make online spaces more accessible, check out Simon Fraser University's resource for Access and Equity in Online Engagement.

Running your Zoom meeting

Facilitating a video call is fairly different than an in person meeting. It is harder to judge and respond to the energy level in the "room", and it's harder to judge who's going to speak next. The biggest problem is that Zoom meetings can easily lose some of the important feelings of community that being together in a room creates, instead becoming just a recitation of impersonal updates. To try and prevent this from happening, here are some norms for a successful Zoom call. The facilitator should go over these at the beginning of any zoom meeting.

- Generally, people should mute themselves if they're not talking, in order to cut down on background noise. However, if you have a pretty small group of people, it feels more participatory to keep everyone off mute.

- Ideally, everyone should keep their video on. However, it's also important to understand that some people may have access needs that make doing so uncomfortable or impossible - so be flexible!

- It's easy to get distracted when you're alone in your room talking to a computer. Encourage team members to close other tabs on their computer, and put their phone away. (tip: knitting/crafting is a good way to keep your hands away from devices!)

- The chat is a useful tool. If one person is talking or presenting something, other team members can ask questions in it.

- To replace raising hands and keep track of who's talking next, keep "stack" by using these symbols in the chat:
  o * in the chat to make a point
  o ** in the chat to make a direct response to what someone has just said (jumps to head of queue - use this sparingly!)
  o ++ for agreement (or, do jazz hands!)

- Especially when there's more people at a meeting, it can be helpful to have 1 person facilitating the conversation and 1 person in charge of keeping track of the speaking queue
- Remember to still include energizers/breaks! It's exhausting to look at a screen for more than 1-1.5 hours.
- If you have a bigger group, split into breakout rooms to discuss things! Especially before making decisions.

→ *Check out this guide from Our Time for more tips and suggestions about running a virtual meeting.*

Accessibility:
To make sure the meeting is accessible in an audio-only or visual-only format:
- Talk through your agenda at the start of the call.
- Type out check-in prompts or breakout group questions in the chat.
- Monitor the chat continually throughout the meeting so you can address comments/questions there.
- Read chat comments/questions out loud to accommodate participants who may not be looking at the chat.

Slides:
Training for Change has developed a set of **template slides** that includes a participation circle and virtual sticky-note brainstorm. Here's a template. You can make a copy to save on your own Google Drive and tailor it to meet your needs.

Speaking order:
- Whenever you're doing a round, you can make participation more accessible by letting folks know in advance when their turn is coming up.
- For smaller meetings, you can fill out the participation circle on Slide 2 (make sure to vocalize the order so that audio-only folks can note who will be speaking before them).
- For larger meetings, it may be easier just to call on folks. In that case, try to indicate the next two people to speak. If you have a co-facilitator, one facilitator can keep track of who has spoken (looking at a full list of participants, which tends to change order). It's best to do this **both vocally and in the chat**, unless you have captioners.

Engagement tools:
- Sticky-note brainstorm (Slide 3)
- Prompts (Slide 4)
- Spectrogram (Slide 5)
  - 10 Ways to Use a Spectrogram Online (Training for Change)
- Polling
- Breakout rooms
  - Tips for using Breakout rooms on Zoom (Training for Change)

Check-out Questions:
- Keep the checkout question brief and light-hearted (if that feels appropriate), but give participants some space to express anything weighing on them before the call ends.
- For meetings of more than 10 people, you may want to ask people to check out in the chat, or keep it to a one-word vocal checkout (e.g., one word to describe how you're feeling).
- If one Zoom meeting "host" can be available for a half hour after the meeting ends, consider leaving the meeting open so that folks can stay to socialize. This is an important feature of in-person meetings that doesn't always come easily online!

Interested in planning a webinar? Learn about the difference between meetings and webinars here.

Appendix
Seven key Zoom security functions:

1. Don't use your personal meeting room ID to create a meeting, or share this ID widely. Anyone with this link would be able to join and then have ongoing access to that virtual meeting space.
   - Instead, select "one-time meeting ID" or "generate automatically" in the settings.

2. Set a password for your meeting.

3. Enable a waiting room.
   a. Selecting "enable waiting room" in settings allows you to screen who is trying to access the meeting and keep unwanted guests out.
   b. It's a virtual queue, and as a host you can admit people one by one, remove them or admit the next person in any order.

4. Require registration.
    a. Tick the "Required" box next to registration in the basic meeting settings.
    b. Scroll down to the bottom of the meeting page once you have saved basic settings and click on the "Registration" tab.
    c. You can adjust settings so that the meeting host must review registration requests and "accept" them based on who the meeting is intended for.

5. Don't let people join before host.

6. Ensure only the host can share a screen.
    a. When you're in the Zoom meeting, click the arrow next to "screen share" and then advanced sharing options.
    b. Under "Who can share," select "Only host."

7. Don't ever share screenshots of Zoom meetings that would reveal Zoom user IDs and Zoom meeting IDs.

Check out this Training for Change guide for more detailed security advice.

More tips for making online meetings engaging.
- Building community agreements together.
    - Dancing.
    - Music/singing.
    - Online meeting bingo!
    - Show-and-tell (anyone using audio-only can describe their object).
        - What's one object in your space that gives you strength?
        - What's the weirdest thing in your space right now?
    - List brainstorm.