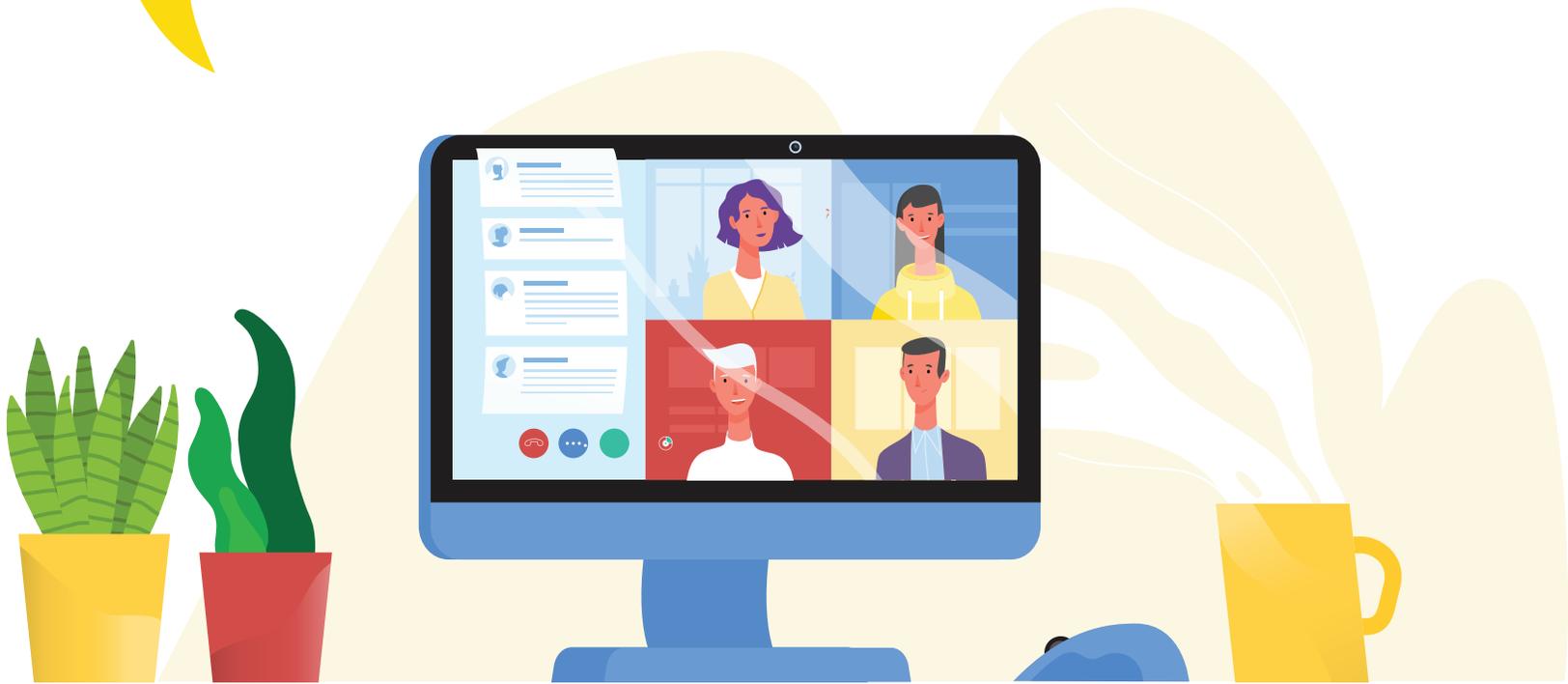


TECHNICAL GUIDE:
ZOOM MEETINGS
FOR NONPROFITS



COMMUNITY
FOUNDATION
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Before You Create a Meeting

Choosing a type of meeting

There are two types of Zoom meetings:

- **Meetings** - interactive, everyone has the option of joining via video, speaking, if unmuted
- **Webinars** - passive, only the presenters you delegate can share video; everyone else is a viewer

When choosing, think about the purpose of your meeting, and consider its parallels to the in-person meetings you are used to hosting.

If, in your in-person gatherings, you promote interaction and community building, use the meeting feature, rather than the webinar!

In most circumstances, the meeting feature will be the better choice. This guide will focus on Zoom **meetings**, rather than webinars.

Staff roles

Always assign at least two people to run the meeting:

- **Facilitator/host** - to welcome people and present during the meeting
- **Technical lead** - to handle the participants and waiting room, ensure people are muted, manage the chat, etc.

Setting Up Your Meetings

Designate an internal user to be the **TECH LEAD** for your meeting. This is a backup/administrative role to help set up and manage the meeting and any details that come up during. These instructions are for your **TECH LEAD** to follow.

Schedule your meeting from the Zoom website:

- ✓ Require a meeting password.
- ✓ Mute participants upon entry.

- ✓ Enable your waiting room and customize it with your logo.
- ✓ Record the meeting automatically on the cloud .
- ✓ Assign alternative hosts (if any).

Your meeting set up should look like this:

The screenshot displays the Zoom meeting settings interface. It is organized into several sections:

- Meeting Password:** A checkbox labeled "Require meeting password" is checked. Next to it is a text input field containing the password "295591".
- Video:** This section has two rows of radio button options. The first row is for "Host", with "on" selected. The second row is for "Participant", also with "on" selected.
- Audio:** This section has three radio button options: "Telephone", "Computer Audio", and "Both". "Both" is selected. Below these options is the text "Dial from United States of America" followed by a blue "Edit" link.
- Meeting Options:** This section contains several checkboxes:
 - "Enable join before host" is unchecked.
 - "Mute participants upon entry" is checked, with a small icon to its right.
 - "Enable waiting room" is checked.
 - "Only authenticated users can join" is unchecked.
 - "Breakout Room pre-assign" is unchecked.
 - "Record the meeting automatically" is checked, followed by two radio button options: "On the local computer" (unchecked) and "In the cloud" (selected).
- Alternative Hosts:** A text input field at the bottom contains the email addresses "awilliams@sonomacf.org,kdemarest@sonomacf.org,adiazdeleon@".

Adjust Your Settings on the Zoom website

TURN ON AND CUSTOMIZE THE WAITING ROOM

(Note: you will only have to do this once for your user account.)

1. Go to Settings > In Meeting (Advanced).

2. Click to turn the waiting room on.
3. Click to customize the title logo and description.

Waiting room

When attendees join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing attendees to join before host. 

Choose which participants to place in the waiting room:

All participants

Guest participants only 

Customize the title, logo, and description 

CUSTOMIZE THE TITLE, LOGO, AND DESCRIPTION

1. Click to **edit the welcome text** and replace it with something like this: “Thank you for joining us! The meeting will begin soon.”
2. **Upload** your organization’s logo.

The screen should now look like this:

Customize the waiting room UI

Meeting ID : 888-888-888

Thank you for joining us, the meeting will begin soon. 

 { Your Meeting Topic }

[Add waiting room description](#)

Logo should be in GIF/JPG/PNG format. The file size cannot exceed 1MB
Logo minimum width or height is 60px and cannot exceed 400px

[Close](#)

Preparing For the Event

- ✓ Track RSVPs!
- ✓ The day before the event: send a reminder email to all attendees using the **BCC** field.

Subject line: Zoom link for tomorrow's [EVENT NAME]

Thank you so much for signing up to attend our [EVENT NAME] taking place tomorrow, [EVENT DATE] April 22, from 10:00-11:00 am.

We look forward to seeing you, and [PURPOSE OF EVENT] offering both an update from our Investment Managers and an opportunity to ask questions.

Here is the information you'll need to join the meeting:

[COPY ZOOM INFO, MAKE **BOLD** WHERE TEXT IS BOLDED BELOW]

Click to join the Zoom meeting: <https://zoom.us/j/275608236>

Meeting ID: 275 608 236

Password: 54631

Call in option:

One tap mobile

+16699006833,,275608236# US (San Jose)

+13462487799,,275608236# US (Houston)

Dial by your location

+1 669 900 6833 US (San Jose)

Meeting ID: 275 608 236

Find your local number: <https://zoom.us/u/aBFBjL8tT>

Please reach out to me if you have any questions!

Thank you,

[NAME & SIGNATURE BLOCK]

Practice!!

Schedule a practice session with your co-hosts at least one day ahead of the meeting.

- ✓ Ensure everyone can connect and practice admitting them from the waiting room.
- ✓ Test out screen sharing. Make sure you are confident in navigating these controls.
- ✓ Practice your agenda and what you want to go over during the meeting.
- ✓ Use the chat feature to get familiar with it.

CROSS TRAIN YOUR CO-HOSTS:

Make sure that all of your staff/co-hosts are familiar with these controls, and are prepared to jump into the hosting role if any technical issues arise.

- ✓ Have each of your team members practice using the Zoom controls, sharing their screen, and navigating the waiting room and chat windows.
- ✓ Have each team member practice their hosting/speaking skills.

The Morning of the Meeting

- Check for any last-minute RSVPs and send Zoom information to them
- Send email to all INTERNAL Staff/meeting hosts. Include:
 - Final **RSVP list** in excel format—sorted by attendee **FIRST** name.
 - Zoom meeting links!
 - A reminder **asking meeting hosts to sign in at least 10 minutes before** the event to get any last-minute tech issues sorted out ahead of the meeting.

Immediately Before the Meeting

30 MINUTES BEFORE MEETING STARTS

- ✓ Keep RSVP list open in a separate window. Add a column titled “Attended?”
- ✓ Close any applications on your computer that might make a noise during the meeting (Outlook, Slack, etc.).
- ✓ Double-check your settings in Zoom to ensure your meeting is set up with the waiting room!

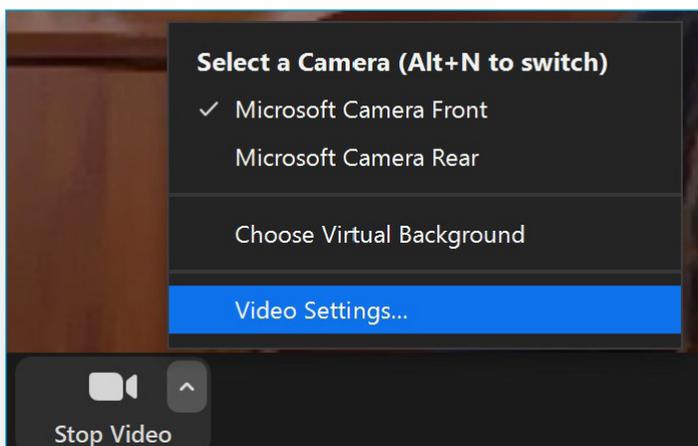
15 MINUTES BEFORE MEETING STARTS

- ✓ Log in to Zoom and start your meeting early.
- ✓ Adjust your video settings.
- ✓ Turn off screen sharing for everyone but the host.

CHECK YOUR VIDEO SETTINGS:

(Note: you will only need to do this once for your user account.)

Click the arrow icon next to the video camera and choose video settings



Check the following settings to match:

My Video: Enable HD
 Mirror my video
 Touch up my appearance

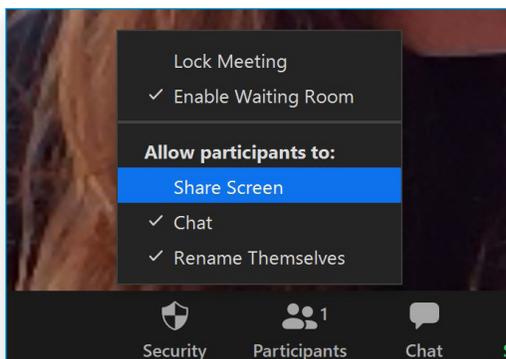
Meetings: Always display participant names on their video
 Turn off my video when joining meeting
 Always show video preview dialog when joining a video meeting
 Hide non-video participants
 Spotlight my video when I speak
 Display up to 49 participants per screen in Gallery View

Advanced

TURN OFF SCREEN SHARING FOR EVERYONE EXCEPT THE HOST AND CO-HOSTS:

(Note: you will need to do this before EACH meeting.)

Click the Security button at the bottom of your screen. **Un-check** Allow participants to Share Screen.



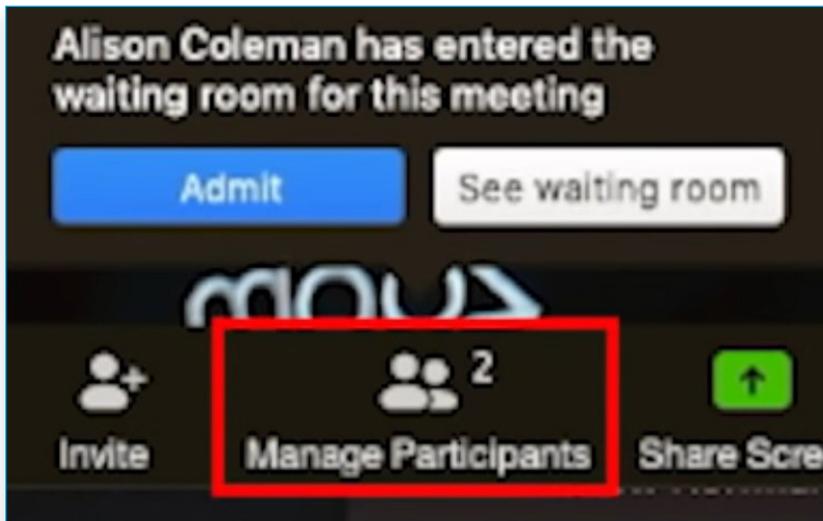
- ✓ Make sure recording is ON.
- ✓ Admit your co-hosts as they join the waiting room. Make sure everyone's video and audio are working.

Starting the Meeting

MANAGE YOUR WAITING ROOM

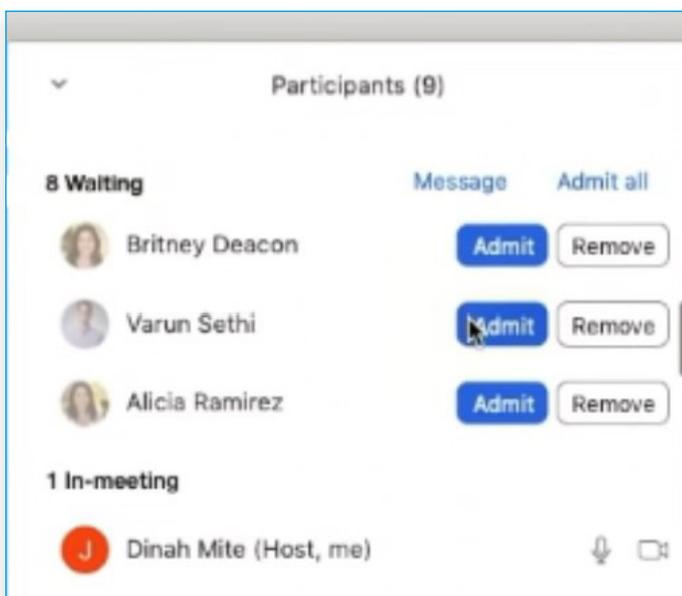
As they log in to join the meeting, your guests will be in the **Waiting Room**.

To let them in, click the **Manage Participants** icon to see the waiting room.



You can let selected guests in **one by one** (use this to let in your colleagues when they arrive early before the meeting).

You can also add them all at once. Once the meeting start time comes, click **Admit All** to add all of your guests to the meeting at one time.



DURING THE MEETING

Late guests: let any late guests in from the meeting room as needed

Introductions:

- Your meeting host (whoever is speaking) will likely lead a round of introductions. Have them introduce you first, and let guests know:
 - You are glad to have them here.
 - You will be sending out a recording of the meeting afterward, along with a post-event survey. (If applicable)
 - If they have any questions during the meeting, invite them to use the chat feature to share them, let everyone know you will address as many questions as you can.
- Your host may ask an opening question or ask for something more than just the guests' names and orgs. If there are other questions they will need to answer, type them into chat using this format:
 - “Welcome! Please introduce yourself and share 1) your name 2) your organization and 3) what you hope to hear/learn/ other opening question.”
- During introductions, folks will unmute themselves to talk; they may not remember to re-mute themselves. Scan through the Manage Participants list to check for any unmuted guests and re-mute them as needed.

Track attendance (*as you have downtime in the meeting*) by hopping over to the RSVP list you have open in Excel, type yes next to their names in the “Attended?” column.

Be helpful with reminders! Add any relevant links, email addresses, or other things into the chat as they come up. For example:

- If a host says “reach out to me afterward” or “please email me,” take a moment to share their email address in the chat.
- If there is a link on your website (or elsewhere) that has additional information, please share that in the chat.

Use private messages. Send to other hosts as needed (for time checks, notices about background noise, etc.) but be MINDFUL. It is possible to get this step wrong and send a private message to the entire chat—double-check before you send any messages, and don't say anything that would be disastrous to have go to the whole group in the worst-case scenario!

USING THE CHAT

- ✓ If you have instructions or an opening question, you want people to go around and answer: say it out loud and also **add any instructions to the chat as a reference for people.**
- ✓ Ask people to **share questions** they have in chat so that you can address them.
- ✓ Or ask people to **use the reactions** to raise their hands when they have a question.

MANAGING ANY NOISE

Guests will be automatically muted when they enter the meeting. They can unmute themselves to talk, and may forget to re-mute themselves when they are done.

If this causes background noise, look for any unmuted people and mute them yourself by clicking on the **Mute button** above their picture.

If you have a large group and are inviting people to speak, call on them individually and **unmute** them if they are having trouble with that.

If Something Goes Wrong

TROUBLE AT THE MEETING START

- ✓ If a host or co-host is having trouble connecting, but you have guests waiting and the start time has arrived, **let guests in from the waiting room and START** the meeting! Your guests will leave if they are not sure what is going on, and the start time has passed.
- ✓ **Over-communicate:** tell the guests who have arrived and let them know that you are experiencing a short delay. Repeat it constantly as new guests arrive, and put the message in the chat as well.
- ✓ If the technical issues with co-hosts or connections to remote live streaming, persist more than 1-2 minutes, have the meeting host/facilitator **begin the meeting anyway** and try to troubleshoot these issues while they start the meeting.
- ✓ It is better to have a meeting start than to have people waiting.

CONNECTION PROBLEMS DURING THE MEETING

Build redundancies and plan ahead:

- ✓ Make sure that multiple people have a copy of the PowerPoint (if you are sharing one) so that someone can take over.
- ✓ If you are hosting a moderated Q&A with a guest speaker: make sure everyone, including the guest speaker, has a copy of the questions ahead of time so someone can jump in if your moderator's connection is lost.

CHAT

- ✓ Remind attendees to **use the chat** feature to ask questions or share during the meeting.
- ✓ Have your tech lead or another person pre-designated to **track questions that come up in the chat**, in a word doc if needed, to make sure that questions do not get missed when you are ready to address them.

CALLING ON PEOPLE TO SPEAK

If you have a manageable group size asking people chime in is an ideal way to break up the content and encourage participation.

Have your moderator call on people to make sure people have a chance to be heard.

If your entire group is using the video (rather than calling in), you can ask people to raise their hands so you can see who to call on next.

After the Meeting

- ✓ **Review your recording:** Zoom will email you a link to the recording.
- ✓ **Trim the beginning and end of your recording** to cut out the moments of waiting before and after the event—refer to [this guide on Zoom's website](#) if you need instructions.
- ✓ **Send a follow-up email to your guests**
 - Thank everyone for joining you.
 - Share any relevant follow-up information.
 - Share the recording:
 - Copy the Zoom recording sharing URL and password from the Zoom recording website.

Some Considerations on Aesthetics

LIGHTING AND CAMERA ANGLES MAKE ALL THE DIFFERENCE

Your room lighting and camera set up will make a huge difference to the aesthetics of your video. This requires a bit of experimentation! To test things out, start a Zoom meeting, but do not invite anyone else into the room. Then play with your lighting and room placement!

CAMERA/COMPUTER PLACEMENT:

Elevate your computer on a stack of books so that the camera is slightly above your head. A slight downward angle is flattering!

LIGHTING

You'll want your lighting to be **in front of your face**, not behind you. Find a table lamp with a light-colored shade (to diffuse the lighting) and put it on the desk behind your computer; if needed, elevate it on a stack of books.

Too much back-lighting tricks the camera into thinking you have enough light and fails to light your face adequately, making you look dark, and your background too light.



Too much overhead lighting gives a harsh look, makes your face look shiny, and adds shadows under your eyes.



Too much side-lighting happens if you are sitting next to a window and shadows 1/2 of your face.



BEST LIGHTING

The camera is elevated slightly above your head, curtains are covering windows behind you to prevent excess back-lighting, and the lamp is placed behind your camera to light your face gently.



MORE ABOUT YOUR BACKGROUND

A white (or plain colored) bare wall that is directly behind you is aesthetically a little flat. Play with this too, if you can!

Try:

- ✓ Finding an angled placement for your desk or table that puts you slightly at an angle, rather than parallel to the wall.
- ✓ Placing a plant or fresh flowers behind you to add some visual interest to your background.
- ✓ Hanging art on the walls behind you.

Try NOT to:

- ✓ Place a window behind you; it will provide too much back-lighting.
- ✓ Forget to check your background before you start your meetings; look for any distractions like boxes, things on the floor, etc.

I hope this guide has been helpful to you.

**If you have questions, or suggestions for improvement,
please get in touch with me!**



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