Tips for Successfully Facilitating a Meeting in Zoom at Cal Poly

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Cal Poly Zoom Website

1. **Scheduling:** Schedule your meeting and control your Zoom settings via a browser (e.g., Safari, Chrome, Firefox) by going to the following URL: https://calpoly.zoom.us
Follow the instructions for scheduling a meeting on our Cal Poly Zoom Website

   Editing a Meeting: You can always edit your meeting settings by returning to the meeting just the way you scheduled it except instead of clicking **"Schedule a New Meeting,"** click on **"Upcoming Meetings."** In the list of meetings, search for the meeting's topic link, scroll to the bottom of the page and click "Edit this Meeting."

   (**Note:** Although it is possible to schedule and join meetings from the Zoom app that is installed on your computer the first time you use Zoom or available from a mobile device, it is best to schedule and start meetings that you are hosting from the Cal Poly Zoom site as it provides you with a lot more options. If you are simply joining someone else's meeting, then the Zoom app is fine for that purpose.)

2. **Read:** Consult the Cal Poly website and peruse the following sections:

   a. Faculty: Getting Started Teaching with Zoom

   b. Configuring Audio & Video in Zoom

   c. Zoom's Special Features

   d. Zoom Etiquette

3. **Security:** For security purposes and productive meetings, please review the Quick Overview of Tips for Zoom Security Settings. Not only will these help protect your meeting against Zoom Bombings by people who were not invited to your meeting, but it will assist you in choosing proper settings for your meeting, such as **"Mute all participants upon entry"** and "**Disable Join Before Host,"** which will make your meetings more successful.

4. **Before Your Meeting:** After you schedule your meeting in Zoom as the host, send out the Zoom meeting link, meeting time, and agenda (if applicable) several days before the meeting and then again about 1 hour before the meeting time. You can also share content ahead of the meeting, or in real-time with the Zoom Chat and Files feature. Such content might include agendas, slides, notes, reference materials, and URLs. If you

don't wish to share pertinent URLs ahead of time, consider creating a document with important URL links that you or the moderator can copy/paste into the chat during the meeting.

5. **Partners:** If possible, identify partners that can assist you during the meeting.

   a. Identify a "co-host "who can step in and run the meeting for you if you're not able to attend the meeting.

   b. Identify a "moderator" (sometimes the same person as the co-host) to monitor and respond to the chat questions as well as bring to your attention (near the end of the meeting) the questions that they could not answer. Ask the moderator to keep track of time for you and save out the chat at the end of the meeting in case you forget to do it. Sending out the chat text file (.txt) to attendees is a nice gesture if there were some great, creative ideas or URLs shared in the chat during the meeting.

   c. When scheduling a meeting, consider assigning someone to be the "alternative host." An alternative host is different than a co-host since an alternative host can start the meeting and host the meeting in your absence. A co-host cannot start a meeting, but a co-host can run a meeting once a host or alternative host starts the meeting; thus, the co-host can continue to conduct the meeting after the host or alternative hosts leave the meeting. (Note: You can have multiple alternative hosts simply by placing their Cal Poly email address in the alternative host box when scheduling the Zoom meeting.)

6. **Practice Beforehand:** If it is your first time holding a Zoom meeting, schedule at least 30 minutes with your presenters and stakeholders a few days prior to your event to review the technology, discuss roles and tasks, and finalize your content. Presenting is complicated enough without adding the possible glitches of using technology that you are unfamiliar with. We suggest scheduling your rehearsal or dry run as a separate meeting or webinar from the live event.

7. **Background Selection:** Choose a neutral background to hold your Zoom meeting such as a white or solid color wall. Wear solid color clothing and avoid strange patterns, stripes, and plaids. Consider creating a virtual background, even if you don't own a green screen, in order to hide the clutter of your office/home environment.

8. **Tips for Starting the Session:** Open your session at least 15 minutes before the start time of the Zoom meeting. Consider sharing a PowerPoint or Keynote slide that lists some participant rules of engagement, such as:

   a. Mute yourself when not contributing to the conversation.

   b. Introduce yourself each time you speak (with a large crowd, it can be hard for you and the participants to identify who is speaking since not all the participant will appear at the top of the Zoom window unless they scroll).

c. Turning your video on is a personal choice and not mandatory. If your internet connection is poor or spotty at times, it may be best to disable video to achieve a better connection. (Hosts should always have their video on!)

d. When the session is opened up for questions, tell the participants that their mics are muted and to raise their hand within the Participants window (i.e., the button at bottom of screen) and wait to be called upon. The host or moderator will select the next person in the line-up and unmute the participant's microphone so that they can speak. This keeps people from talking over one another and allows participation by everyone.

9. **Record to the Zoom Cloud:** If you decide to record the meeting for people to view later, record it to the Zoom cloud so that automatic captions will be created. No captions will be available if you record to your local computer from Zoom. It is Cal Poly's policy, according to Section 508 of the Federal government mandate, to provide captions for <u>every</u> recording and to properly edit them afterwards.

10. **Consider Using Dual Monitors:** It may prove quite difficult to manage all aspects of an online event on a single monitor. If you are using screen sharing to display PowerPoint slides, you may find windows are always in your way while you present. If you have access to a second monitor, you can host the screen sharing on your primary display and move windows like your Participants List, Chat, and Polling to a secondary monitor, which will give you a greater ability to track everything at a glance. Don't have dual monitors? Bring a second laptop to your meeting and make sure you assign it to be a co-host and then you can monitor additional features there.

11. **Equal Engagement Opportunities:** Try to ensure that Zoom participants have an equal chance to engage. Be sure to invite Zoom participants to speak up, pause for them to do so, and do this at multiple points during your meeting.

12. **Be Mindful of Disabilities:** Be mindful of participants in your meeting who may have disabilities, including situational ones. Focus on including everyone. Please be aware that using extra meeting features or complex functions such a polling can be difficult for people using screen readers or mobile devices.

13. **Describe Visuals:** Be sure to provide descriptive narratives of the visuals when showing images or charts. This will help those who are visually impaired or those that have poor video quality.

14. **Breakout Rooms:** If you decide to implement a [Zoom Breakout Room](#) during your meeting, please instruct your participants ahead of time how a breakout room works, how they can contact you and ask you to enter their breakout room to answer questions, etc.

15. **Microphones:** Use a good microphone! Usually the one installed on your computer is good enough for normal meeting usage, but an installed microphone usually doesn't

produce quality automatic captions during the recording. If you wish to avoid spending a lot of time editing your captions after you have recorded, consider buying a better external microphone that plugs into your computer. See [External Microphone Selections for Zoom](#).

We hope these tips will help you have a successful first hosting experience in Zoom!