Zoom Facilitation Tips and Tools

This handout was first developed during the COVID-19 pandemic. Even if Zoom's tools change a little over time, we hope this advice and encouragement will support you in your remote meetings. Many people have told us this handout is helpful so we're continuing to offer it!

Plan to look and sound good

- Sound quality is most important
  - Good headset or ear buds
  - No other sounds in your space
  - On some devices: be on mute all the time but press the space bar when you want to un-mute
- How you look also matters
  - Webcam at a good height
  - Good lighting
    - Nice background
      - They're fun but I'm generally not a fan of the fake backgrounds that Zoom allows. They reduce authenticity.
- Do trial runs
  - Practice!
  - Start and run fake meetings all by yourself.
- Use up-to-date stuff
  - It works well to have a fairly current computer and up-to-date apps

Advance settings and invitation

- Settings
  - Make sure everything is set how you want
  - You can access some settings in your Dashboard (the thing that pops up when you open the Zoom app on your device) but you can access ALL settings at the Zoom website
  - Two ways to access all settings
    - In your Zoom Dashboard, from the Home tab, click on the Gear Icon in the top right corner.

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                - If you don't find what you need in the next pop-up window, click on View More Settings at the bottom
        - Sign in at the Zoom website
            - Access your personal profile page by clicking your picture (or dummy icon) in the top right corner
        - It you're not sure what a setting does, let it alone
        - Not discussing specific settings here – there are so many and it's a matter of preference
            - Learn yourself at the Zoom Support Center (find the link at the bottom of every page at the Zoom website)
            - Trial and error – change a setting and then see what effect it has
- Invitation
    - Zoom generates an invitation for every meeting and of course, it's fine to use that.
    - If you want to keep your invites simple, here's what you really need:
        - Link
        - Meeting ID
        - Phone Number (choose just one from list provided by Zoom)

Facilitation prep

- Critical prep questions
    - Will I have a helper and if so, who does what?
    - How to get input?
- Consider having helpers
    - Define roles
    - Practice
    - See below for Helper Roles
- Have a Staff Agenda
    - Make and write a plan for how you are going to handle every agenda item
- Prep your Props
    - Hold-Up Cards
        - Pre-prepare large index cards with markers
        - Black only – colors are hard for some people to see
        - Hold them still when you hold them up
    - Slides
        - What
            - To convey information
            - To ask question or convey prompts
            - For you to type summary notes on for everyone to see
        - How
            - Word or PowerPoint
            - If in Word:
                - Page set up: Landscape

        - Use 2 columns or text boxes to maximize the amount of text you can show on a single "slide"
        - Don't make the font too small
    - Polls
        - Host needs to enable in advance
            - Signed in at your personal profile page at the Zoom website
            - Settings – Polls – Allow
        - Best if set up in advance
            - Signed in at your personal profile page at the Zoom website
            - Meetings – personal meeting room – scroll to the bottom to set up polls
    - Google Docs
        - See Google Docs for shared writing below
- Consider phone-only participants
    - If you have phone-only participants who need to fully participate, it will significantly limit what props and tools you can use

Helper roles

- Chat Monitor
    - Focused on watching the written conversation and/or questions so the facilitator doesn't have to. Looking for commonalities and discerning themes that they are ready to convey to the facilitator on a moment's notice.
    - Doesn't work well – in a meeting larger than 10 or so where there is lots of chat – for the facilitator to have any obligation to pay attention to Chat or Questions. If you don't have a Chat Monitor, have a ground rule that if someone wants to say something for the facilitator to hear, say it out loud.
- Tech Operator
    - Managing the technical aspects. Muting and un-muting people. Helping people with individual tech and access issues one-on-one via Chat.
    - In most meetings up to 40 people or so, it's perfectly fine for the facilitator to play this role IF the participants know how to use Zoom.
- Note Taker
    - Not to be overlooked just because the meeting is online and/or being recorded. This job is just like it is in face-to-face meetings: someone who provides a concise and accurate written record of the most important stuff. Skilled note-takers can do this in real time and need not spend huge amounts of time "going through the recording" later.

Offer a "get acquainted" session

- 20-30 minutes before the start of the meeting
    - Advertise this in advance
- Help people get connected
    - Show your phone number on a card if someone needs to call you

- Stuff to do with people arriving early
    - Change your display name (click on your name in the participants list)
    - Check out the chat feature
    - Practice raising hands
    - Practice reactions
    - Mute and unmute video and audio
    - Check out different views

What to cover in your ground rules

- Focused on the objectives
    - Remind the group of the focus – why we are here
- Key roles
    - The facilitator is in charge
    - Perhaps also a Chat Monitor, Tech Operator, and/or Note Taker.
    - Introduce everyone and their roles
- Explain how to give input – see below
    - Clarify this and stick to it
    - Explain the hold-up cards if you have them
- What's to be provided later
    - Clarify what will be provided after the meeting and what's okay to share

How to get input – four options

- People blurt stuff out
    - Good for small groups and if people know each other
- People say stuff and ask questions on Chat
    - Requires a Chat Monitor if the group is over 10 and active on Chat
- People write on a shared Google Doc
    - Needs to be set up in advance – see Google Docs below
- People raise hands and wait to be called on
    - Virtually
        - Video participants
            - "Raise Hand" – it's an icon under "Reactions"
        - Phone participants
            - *9 on your phone
    - Actually
        - Works for video only – people put up their hands – you know, like in school

Google Docs for shared writing

- Or any space outside of Zoom when people can go and write things and see what others have written
- Set up in advance with a Google account

- Set the page permissions so anyone with the link can edit
- Grab the URL of the page and shorten it using BitLy, TinyUrl
- Grab the shortened link and paste it into the Chat in your Zoom meeting
    - That will be a clickable link
- You can also provide that link to participants in advance
- Use the Screen Share feature in Zoom to show, in Zoom, what people are writing

Screen sharing

- Host needs to enable in advance
    - Signed in at your personal profile page at the Zoom website
    - Settings – Screen Sharing - Allow
- Consider in advance who should be allowed to share without permission
    - "Zoom bombing" is a thing - Google it to learn about it and how to protect against it
- When you "Share Screen" (the icon in your Zoom Control Bar at the bottom of your Zoom screen), you basically have three choices:
    - Share your Desktop
        - Whatever is on your computer screen, even if you toggle between apps, it will be shared
    - Share a specific app
        - You can toggle out of the app on your computer but everyone else will see just one specific app, the last way you left it
    - Share the Whiteboard
        - This is a place where the host can draw and type
        - It's clunky compared to a Word document, but sure is handy
        - All participants to annotate it also if enabled by the host
            - Signed in at your personal profile page at the Zoom website
                - Settings – Annotation – Allow
    - When sharing your screen, others cannot see your video image but can hear your voice
    - When you are screen sharing it's easy to "lose" your Zoom Control Bar. "Wait! Where did that go?"
        - To get your Zoom Control Bar back, find the blue Zoom icon on your screen, maybe in your "dock," and click on that.

Breakout rooms

- Host needs to enable in advance
    - Signed in at your personal profile page at the Zoom website
    - Settings – Breakout Rooms – Allow
- Great for allowing many more people to talk at the same time
    - Also great for private side conversations
- Learn about them at the Zoom Support Center (access at the bottom of any page at the Zoom website)

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- Practice them
- Like with face-to-face meetings, consider in advance how data and results from the breakout rooms will be shared and or used for future decision making

Have a welcoming start

- Say hello to people as they arrive
- Encourage people start with Gallery View
- Don't have your head down working on some tech issue or on some other app as people join the meeting

Engage quickly and often

- Apart from trying to engage people as they join, run an engagement activity within 3 minutes of the start of the meeting
- Introductions with a quick question
- Could be in pairs

Ask specific questions in the negative

- Not:
    - Does everybody think that's a good idea?
- Instead:
    - Okay, here's the idea. [paraphrase it]
    - If you have any concerns about this idea or want to talk about it more, please raise a hand.
    - If I don't see any hands, I'm assuming you like the idea and I'm moving on.

Keep presentations and slides to a minimum

- If presentations are needed, encourage video of the person talking rather than slides
- It's hard enough to hold attention with slides in a face-to-face meeting, when we have other stuff to look at such as the speaker. When we have ONLY slides to look at, it's extremely hard to hold attention.

Let YOU shine

- Be yourself. Be natural.
- If you mess up, say, "I messed up. Hold on while I try to get things right."
- Go with what you know
    - Don't try new technology or techniques without having practiced it first.
- Show us your personality. That's actually more captivating than anything you could ever show on a screen.

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