



# ZOOM MEETING MANAGEMENT

Supporting Facilitators and Participants

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# 1. Approach to Setup and Management of Zoom Meetings

There is always a balance needed between opening interactive features, ease of use and managing risks. In online meetings there is a need to manage disruptions or distractions.

Zoom, as a service platform, can be configured to be wide open, with limited restrictions being placed on participants. This may be ok for small group meetings of known and trusted parties, but is not ideal for larger groups, or groups of unknown parties.

Based on the targeted audience, the size of the audience, and the needs of facilitators or presenters, Zoom should be configured to meet the meeting needs.

## 1.1. Zoom Account Settings (Account Holder)

When hosting Zoom meetings, it is important to understand the purpose and interaction requirements of the meeting, and to manage the security and other risks associated with using such features.

- Sign in to *zoom.us* using your Zoom credentials
- Ensure your Zoom account settings are setup for hosting meetings that offer the features you will need and the security control to ensure meeting effectiveness.
- Enable or Disable features to setup a default that is applicable to typical meeting needs

### 1.1.1. General Account Setting

- Join by Computer Audio Only
- Use Waiting Room / Passcodes
- Do not use Private Meeting Room
- Host can add Co-Hosts
- Always show meeting control bar
- Show Zoom Windows during Screen Share

### 1.1.2. Interaction Feature Settings

Account settings determine the broad feature set available for use during meetings. Many of these settings can then be enabled or disabled during a meeting.

These are guidelines based on experience setting up and managing meetings in an interactive educational context:

- Enable / Allow
  - Participants to Unmute themselves (Mute on Entry)
  - Screen Sharing Host Only
  - Virtual Background
  - Recording (Host to Cloud Recording only)
  - Non-Verbal Feedback (Raise Hand for Q&A, Yes/No etc.)
  - Meeting Reactions
  - Participants to Rename themselves
  - Breakout Rooms
  - Polls (Questions Can be setup in advance or on demand)

- Chat Private and Everyone
- File Transfer (used by facilitator or host in chats)
- Disable / Do Not Allow
  - Personal Meeting ID
  - Annotation
  - Whiteboard
  - Remote Control

## 1.2. Hosting a Zoom meeting

An Example of meeting definition

- Meeting: CLE1.4 Leadership – Building the Team Session 4
- Date 23<sup>rd</sup> September Time 13h00-16h30
- Mike / Bernard to act as Host
- Helene Smit as Facilitator for CLE1.4 (Setup as Co-Host)
- Require Breakouts of 4-6 in size
- Keep breakout groups constant throughout course, same as in sessions 1-3, will be doing project that spans multiple sessions

### 1.2.1. Manage Waiting Room

- Open Meeting 30 mins early, all participants to be placed in waiting room before being admitted
- Let Facilitator in from Waiting Room (time to test before participants join)
  - Appoint Facilitator as Co-Host
  - Can share screen even if other participants cannot
  - Can See Participant List and Admit from Waiting Room
  - Can move between Breakout Rooms
  - Test Screen Sharing, Audio and Video, assist as needed
- Let participants in from waiting room (5-10 minutes before start)
  - Ensure / Request all using Full Name
    - Can ask (privately) to use "Participants->mouse over own name->More->Rename"
    - As host you can rename participants from registration list if they are not responsive and you have the list
  - Request all to remain muted unless required to speak
    - Requested by Facilitator / Host
    - Open interaction time (unless asked to use non-verbal feedback "Rasie Hand", responses etc.)

### 1.2.2. Manage cloud recording

- When session about to begin, start cloud recording
- Pause recording when go into breakouts, restart when participants back in main meeting (there is no recording of breakout rooms)
- Stop Recording at end of each session
- Each day is broken into 2 sessions
  - Stop recording at start of 1/2 hour break

- Start new recording for second session

### 1.2.3. Manage Audio

Audio disruptions can be a problem in meetings. Not all participants are observant in terms of muting and unmuting their microphones.

- Setup meetings so that all participants are muted on entry
- For small group meetings, allow participants to unmute themselves
- For Large meetings, don't allow participants to unmute themselves. Using Zoom "Participants", ask them to unmute as and when required
- Don't "Mute all" as this also mutes Co-Host (can interrupt active presentation)
- Individually mute participants if they cause interference or if they forget to mute themselves after speaking

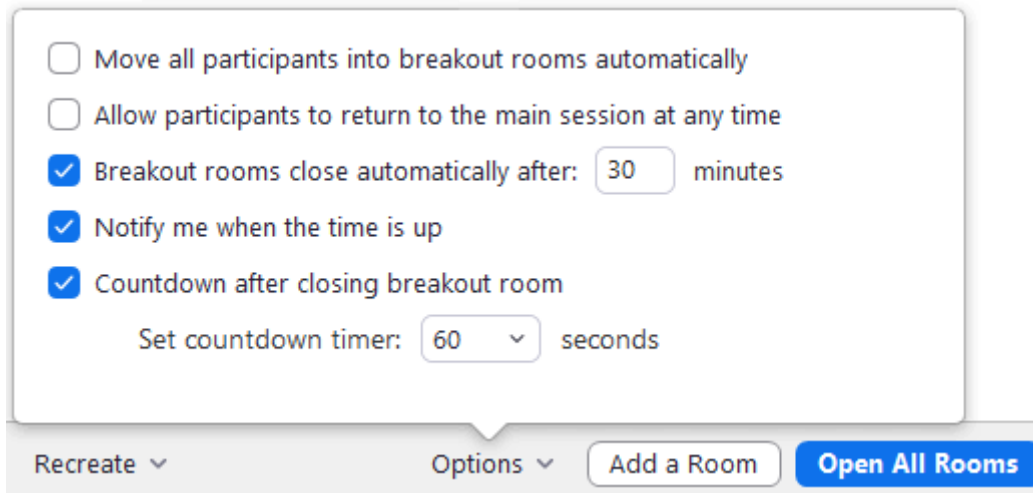
### 1.2.4. Manage Chats

- Monitor Chat threads to be able to respond to call for assistance
- Interact privately if does not impact everyone
- Alert facilitator if needed

## 2. Approach to Breakout Rooms

### 2.1. Setup Breakout Rooms

- Determining the Number of Breakout Rooms
  - Facilitator indicates ideal group size
  - Typically, groups of 3-6 participants can get going quickly, particularly important for short duration breakouts. This choice determines how many rooms you will need.
  - Rename Rooms to match team names if required. This may be required where teams have chosen their own group names.
- Breakout Room Options
  - Facilitator will indicate duration of each breakout (can be set just before starting breakout session)
  - If required, do not allow participants to return to main session at any time (some facilitators may wish to keep participants in breakout rooms until end of breakout session)
  - 60 seconds warning of returning to main meeting room (message will be sent to all participants in breakout rooms)



## 2.2. Assign Participants to Breakout Rooms

Based on the facilitator requirements, the host must assign and manage participants in breakout rooms

- Facilitator may want groups to remain same for all their sessions or prefer to have groups that change to mix up participants for each breakout.
- Where groups work on tasks that span multiple breakouts, typically keep groups constant. Zoom does not remember associations across multiple meetings, so this will need to be defined outside of Zoom meetings.
- Note that when automatically assigning participants will include co-hosts as well. This is not ideal as co-hosts may not wish to automatically be assigned to rooms.
- Manually assigning participants affords the most flexibility and can meet requirement for constant groupings across multiple sessions.
- With the release of Zoom version 5.3x, it is now possible to setup rooms and allow participants to choose which room they wish to join and to move freely between rooms. Participants and host will need to update to version 5.3x in order to fully exploit this.

## 2.3. Managing participants and room assignment

As soon as session starts, if using manual assignment, assign participants to their rooms (save time when rooms needed)

- If latecomers join, or individuals leave and re-join, reassign them to their room
- If required, move participants to a different room
- If required, exchange participants

Example of groups:

Breakout Rooms - Not Started

- P6 Group (Breakout Group 1)** 6
  - Ashwin Arendse
  - Cherice Mangiagalli
  - Francis Carter
  - Jaco Brink
  - Sanchia van Staden
  - Sean Surmon
- SMAKLT (Breakout Room 2)** 5
  - Andy De Bruin
  - Helene Smit
  - khanyisa Tivaringe
  - Lisbé Wever
  - Shirle Cornelissen
- Best is Yet To Come ( Room 3)** 5
  - Earl Mc D
  - Loren Joseph
  - René Robbertze (SU)
  - Sandra Pow Chong
  - Veliswa Tshetsha

## 2.4. Open, Monitor and Close Breakouts

- Open rooms when facilitator requests this.
- Assist facilitator to visits rooms.
  - After being assigned (as co-host) to the meeting, facilitator can be assigned by host to a room
  - Co-Host can then control their own movements between rooms, and return to the main session
- Assist participants as needed
  - May request help while in breakout
  - Host can join room and return to meeting room when needed
- It may be necessary to message everyone at various intervals to help them with time tracking (if requested by the facilitator)
- At the end of a breakout session
  - Respond to prompt to close rooms
  - 60 second countdown initiated before participants must return