Infrequent Zoom meetings Host guide (meant for Board and small chapter meetings, first practice with a friend)

As chapter president and host for Board and chapter meetings via Zoom, apply for a one-year licence for Zoom Pro at www.zoom.us,, plus your desktop webcam up to $50, both reimbursable by sending in CRA Form 165 with a receipt to the National Treasurer. Unlike the free 40 minute version, Pro allows you to conduct longer meetings.

As a chapter president, you may be Host and Moderator (as defined Below) for Board meeting and small chapter meetings, OR designate/ assign a co-Host role to someone else with good Zoom experience for larger meetings.
"Host" – is a defined term by Zoom. Usually, it is the person whose zoom account was used to set up the Zoom meeting. The host is an experienced Zoom user or prior moderatos mostly invisible. They work behind the scenes to run the Zoom software, collect and sift through questions being submitted, mute and unmute attendees and provide screen control to various office bearers with reports or speakers preceded by whoever introduces the speaker at chapter meetings. The host can designate a "co-host."
"Moderator" is usually the President, visible to the audience, explaining what to expect, etc.

Before scheduling a meeting: Designate a Board member to choose the speaker who would be available on your planned meeting date for a Zoom meeting. As a best practice, the person who has recruited and would introduce the speaker has conversations with the speaker before the event. During these conversations, make sure that the speaker is briefed on overall plans for the meeting and the detailed plans for the speaker. Confirm that the speaker is familiar with Zoom, determine whether the speaker would have any visuals to display using his computer, when the host turns the screen over to him, and make sure there are no technical or connection issues.

Two weeks or more ahead: Create a Zoom meeting/invitation
Go to zoom.us My Account, Meetings, **Schedule meeting** blue bar on right
Enter Your meeting title and description, date and duration. (Ensure your time zone). Zoom Pro Duration does not limit meeting end. (Note: Leave at least 15-30 minutes to "meet and greet" before the business session begins)
Do not click on Registration required.
Ensure Waiting room is not checked.
Click on Meeting ID Generate automatically and Passcode.
Video Host and Participant ON, Audio Both
Meetings options: Enable Join before host so they can join well before start time
Leave other defaults as is and **Save**
In next screen **Copy invitation (small print mid-screen right),** next **Copy meeting invitation boxed screen**
Paste this Invitation in your email meeting announcement sent to your Board by you, or to the Chapter email list
Include a short speaker bio is sent out to your board or Chapter e-mail list along with the invitation.
Ask for an email response from those wishing to attend, and for potential questions to the speaker from Board.

Before the meeting, send out the invitation link again prior to the meeting and on the morning before. Have Board members send question to Host. Moderator ahead of time, so the speaker has answers ready to go. Include a "Help Desk" phone number of a Board member to help those having some difficulty during sign in.
Refer to the downloadable "Zoom Host guide for infrequent users", available in Zoom User Guides in the Resources section banner head on the Home Page at www.chevronretirees.org

Ask Board members for speaker questions in a Chat message addressed to the Host (not to All) at meeting start, and if they need share screen for items like Agenda, Treasurer's report.

At least 15 minutes before the announced start of meeting
Log in to zoom.us OR click desktop Zoom icon, my Meetings. Turn on video/audio, check your internet connection
Join early for the Meet and Greet, tell them to click Gallery view (top right icon on on screen) to see all.

The host controls will appear at the bottom of your screen if you are not currently screen sharing.
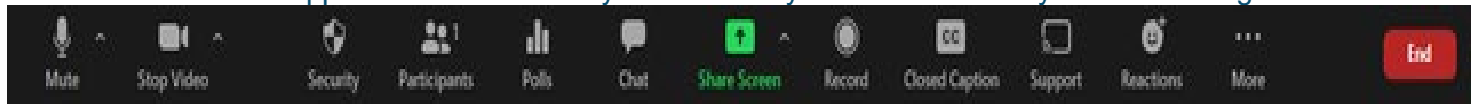
- **Mute/Unmute**: Microphone far left. (click **^** next to **Mute/Unmute**):
- **Chat**: Middle, Access the chat window to chat with the participants.
- **Share Screen**: Green, middle Click to share screen. Select the application to share, like Agenda Word document (don't use whiteboard). While screen sharing, controls appear at the top of your screen.
- **End** (in red, only available to the host): Display the following two options. Leave or Cancel ending.

Host – Have Share Screen enabled for Board members like Secretary, Treasurer to share their documents at Board meetings, or the Speaker for Chapter lunches. To do this
Click on **Security shield** (third from left on host controls above), Allow users to share screen
Next, Click Little green arrow next to screen share
Click **Advanced sharing,** enable these bullets**:**
- One participant can share at a time
- All participants can share
- Only the host can start sharing if someone else is sharing,

(Note: Rarely, if you ever want to take back screen from shared, as host only you can do this
Top of screen green bar says you are viewing xxx screen, next to it view Options stop sharing, get screen back).

At the start of the meeting, remind attendees of video etiquette:
- During the meeting, keep yourself muted to minimize background noise (host may mute all if needed)
- Raise your hand feature in Participants window to ask questions, or wave your hand in front of your face
- Use the chat feature - Privately to the host to ask your questions of the speaker, not to other users.
- No unauthorized recording for Chevron chapter meetings.

To start speaker presentation, if you are on Share Screen, stop your share (move cursor to top of screen red bar) so speaker can click their Screen Share to start sharing his Powerpoint slides

During the speaker session, take the participants summary count for historical reference

At the end of presentation, speaker or Board member stops screen share
Host retrieves Share screen back from speaker, and goes to Gallery view, top right button

Q&A session following a presentation, start with questions received before the meeting, then from the audience (raise hands to be recognized by the host). Leaving all unmuted.for this segment, it works as long as many are not trying to speak at the same time.

Also announcing written questions is an option – At Q&A time, host goes to chat bottom of screen middle of controls, turns on, at the bottom right hand of chat column on the right, click on 3 dots, drop down, participants can chat with Host Only (this sends question to presenter who will present to speaker)

President's last words including thanks to speaker, on screen

End meeting by clicking on End red button bottom right, followed by red Leave meeting button, ends all.

Useful training links for meeting hosts
https://www.youtube.com/watch?v=HbYHaNvCw9M How to attend/Host a meeting for beginners
https://www.youtube.com/watch?v=3WBpYCLLny4 How to host an on-line meeting with zoom
https://www.youtube.com/watch?v=BMmr4sQvSMg What to do what not to do on zoom

Zoom support
- Zoom support link https://support.zoom.us/hc/en-us
- CRA Zoom email – CRAZoomteam@cramail.org If you have questions after your first meeting experience.