Zoom meetings Host guide (Medium and Large Meetings)

As chapter president and host for meetings via Zoom, apply for a one-year license for Zoom Pro at www.zoom.us, reimbursable by sending in CRA Form 165 with a receipt to the National Treasurer. In addition, if you do not have a camera, CRA will reimburse a desktop webcam up to $50. Unlike the free 40 minute version, Pro allows you to conduct longer meetings.

You may be Host and Moderator (as defined Below) for meetings, OR you may designate/ assign a co-Host role to someone else with good Zoom experience for larger meetings.

"Host" – is a defined term by Zoom. It is defaulted by Zoom to be the person whose zoom account was used to set up the Zoom meeting. The host is usually an experienced Zoom user or prior moderator. 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 for speakers who may have exhibits to show. The host can designate a "co-host" to assist with these tasks.

"Moderator" is usually the President, visible to the audience, explaining what to expect, and Chairs the meeting, etc.

Before scheduling a meeting: Choose a 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
In your internet browser (Edge, Firefox, Chrome, Safari) Go to zoom.us. If you already have a zoom account you will see your profile screen, Click on **Schedule meeting** at the top right of the screen. (blue bar). This will bring the screen where you will enter the parameters to define your meeting.

- **Topic:** Enter Your meeting topic and description. Meeting Topic is important because it will display in your invitation and should be descriptive of the meeting.
- **When:** Enter your Date and Time
- **Duration:** Enter your duration. Zoom Pro Duration does not limit meeting end. (Note: Leave at least 15-30 minutes to "meet and greet" before the business session begins)
- **Time Zone:**(Ensure your time zone).
- **Registration:** Unlike Chapter Board meetings where you know who will attend, larger meetings need attendees to register before the meeting. You will need to know how many to plan for (if the number exceeds 100 you will need to increase your license). If you have extended the invitation CRA wide, you will want to verify chapter affiliation of those wanting to attend. You may wish to handle the registration yourself or you may wish to use the Zoom supplied registration process.

Personal Registration	Zoom Registration
- If you wish handle the registration **Do Not** click Registration Required.	- If you wish to use the Zoom registration process **click Registration Requred.**

Please review the Registration Alternatives before deciding on this option.
- **Meeting ID:** Click on Meeting ID Generate automatically
- **Security:** Click on Passcode - Ensure Waiting room is not checked.
- **Video:** Video Host and Participant ON,
- **Audio:** Audio Both
- **Meetings options**:
  - Enable Join before host so they can join well before start time
  - Do Not Enable Mute Participants upon Entry
  - Do Not Enable Require Authentication to Join
  - Do Not Enable Breakout Room Pre-Assign
  - Do Not Enable Automatically Record Meeting (This is subject to your speakers permission)
 Save

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In next screen click **Copy invitation (small print mid-screen right),**

This produces a boxed invitation, **Copy the meeting invitation boxed screen.**

Personal Registration	Zoom Registration
• Create an email asking those that are interested in attending your Zoom meeting to inform you with their Name, Email and CRA Chapter Affiliation. Include the speaker BIO if you have it. • As the responses to your initial message come in, create a file of the data you requested, Name, Email, and Chapter Affiliation. • **Paste** the Zoom generated invitation with the link to join the meeting into an email to each one of these people. • The day preceding your meeting, resend the invitation meeting as a courtesy reminder with a copy of the link to join.	• Copy the Zoom generated **register** message into an email you will send to your anticipated audience. Modify the Zoom generated message to include the speaker BIO if you have it. • Zoom create a CSV file of the Name, Email, and CRA Chapter Affiliation of each registrant. You may elect to receive an email containing Name and Email when a person registers. • Zoom will reply to each registrant with a link to join the meeting • The day preceding the meeting request Zoom to resend the Meeting Confirmation to all registered. **(See the Exhibit I - Zoom Registration for more details on this option)**

As your invitees respond you will be able to estimate the number of attendees. If it is going to exceed the 100 limit you will need to increase your meeting capacity. To do this, go to Zoom.us in your browser. On your Profile Screen, click on *Plans and Pricing* and select Current Plan. In the Available Add-ons, scroll down to *Large Meeting Option* where you can add this option to your plan. Remember to cancel this option after your meeting.

Send questions you receive to Host/Moderator ahead of time, so the speaker has answers ready to go. In all communications you initiate to the attendees, Include a "Help Desk" phone number of a Board member to help those having some difficulty during sign in and include the Join the Meeting link.

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 view (top right icon on on screen) and select Gallery to see all.

The host controls will appear at the bottom of your screen if you are not currently screen sharing.
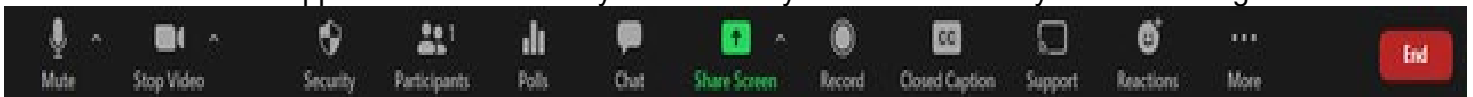
- **Mute**/**Unmute**: Microphone far left. (click **^** next to **Mute**/**Unmute**):
- **Chat**: Middle, Access the chat window to chat with the participants.
- **Share Screen**: Green, middle Click to share screen. Select the application to share, like Agenda Word document (don't use whiteboard). 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.

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Host – Have Share Screen enabled 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.

Zoom Reports – Many reports are available from Zoom. For a brief discussion of some of them please review the Exhibit II - Zoom Reports .

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.