

Zoom Tips and Tricks for Hosting a Conference

Created by the Department of Faith Formation of The Episcopal Church



Technology

- Make sure your application is up-to-date.
- Make sure the host of the meeting has excellent bandwidth. If the host doesn't have strong Wi-Fi or if they can't plug directly in to the ethernet, the entire meeting will struggle.
- Before the meeting:
 - Make sure you have all the settings turned on or off that you will use.
 - Do you want breakout rooms?
 - Do you want participants to be able to share screen?
 - Do you want chat on? (you can also manage this within the meeting)
 - Do you automatically want to save chat?
 - Do you want everyone muted when they enter? We highly recommend this.
 - Do you want people who you have kicked out of the room to be able to reenter? We suggest having this turned on IF you are using a waiting room. That way if someone is accidentally booted, they can get back in.
 - Do you want the waiting room utilized? We strongly suggest using the waiting room. It helps with zoom bombers and it helps manage the Main Room. If you have a waiting room, you can admit team members or presenters to the room before the participants. You can also send people to the waiting room if they are in the main room when they should be in breakout groups but are not responding to the prompts.
 - Test your own audio and video connections
 - Do a run through with key participants and staff.
 - Close other tabs and applications on your computer to help with speed and connection.
- Recording: Only the Host can record the Main Room. If you want breakout rooms recorded, you have to give someone in that room cohost abilities before you send them to the breakout room. Breakout rooms have to be recorded locally and then whoever recorded will need to send you the file.
- Having two screens helps the hosts manage all the components of zoom (chat, participants, documents, etc.)
- Offer a practice session for participants and your cohosts so they can test out their set up.
- Make sure you, as the host, have low-tech options at hand – sticky notes or paper that you can show on screen so participants know what is happening.

Conference Flow

We suggest having a good rhythm between the following elements:

- **Plenary:** where everyone is together.
- **Storytelling or Giving a Talk on a Topic:** Invite specific people to share a story or give a talk (like a TED Talk – not a presentation) on a specific topic.

- **“Chatting”**: Decide ahead of time and plan it on the schedule when chat is open to everyone, when they can just chat to hosts, etc. You don’t want it to be distracting during a sermon or message or if someone is giving a talk.
 - It can be used effectively to take questions (someone should be assigned to keep track of the questions rather than the presenter).
 - It can be used for prayer responses during worship.
- **Prayer**: Either done in plenary or prayer as a small group option. If you are doing prayer in plenary, we highly suggest using music – either recorded or live (we used one musician and invited folks to mute but sing along.)
- **Affinity Groups**: Where people can meet others doing similar work, who live in a similar region, or have similar interests. (This helps replicate the connections that are often made at in-person conferences but that can be missed when you are virtual.)
- **Workshops**: A variety that also includes things with movement like yoga or games.
- **Discussion Groups around a Topic**
- **Open Space**: You can use Open Space Technology in a virtual space, but you have to set it up ahead of time. Because you don’t have the physical wall to put ideas on, you have to create a virtual one. We invited ideas ahead of time on Google Forms and then set the groups up.
- **Social Hour**: Offer an optional social hour, where you just get together at the end of a day and chat. If there are more than 12-15 people who come, we suggest breaking them out into smaller randomly assigned groups.

Communication before the Conference

- Make sure participants have access to a schedule and any supplemental materials in advance of your meeting.
- Set up a website and/or Google Drive Folder where people can access the schedule, documents, workshop descriptions, etc.
- Post on social media.

Schedule

- Keep times zones in mind when setting the meeting times. We always started after noon eastern time.
- Have a Schedule that lists Eastern, Central, Mountain, and Pacific Time Zones to help participants.
- Include Breakout Room numbers or letters on the schedule so people can make choices ahead of time if they wish to.

Team Schedule

Create an extremely detailed schedule or your staff and team. Include:

- When to start the meeting for staff and team.
- Note who is managing the waiting room, chat, tech, etc.
- When to open the meeting for everyone.
 - Note: When you open the meeting, as people are hopping on, having slide up with a note when the meeting will start and music playing in the background helps avoid the awkward discussions and/or silence as people are entering the meeting.

- Any time you need to give instructions.
 - Breakout Groups: Give instructions for breakout groups BEFORE you go on break which will give the staff time to sort people during break.
 - Announcements
- The presenters and hosts for any workshops, breakout rooms, etc. so you know who to give “cohost” abilities to.
- When to call people back from Breakout rooms.
- Who is leading which plenary sessions.
- Who is introducing whom.
- If a special guest is joining you at a specific time so the room host can keep an eye out for them.

Staffing

- Split the duties and responsibilities among at least three different people
 - **Host** – literal host of the meeting. They share all the PowerPoints, video, etc. They help transition between one thing and the next.
 - **Room manager** – person who admits people from the waiting room, sends them to breakout rooms, and puts them in the breakout rooms if they are “unresponsive” when assigning them to breakout rooms.
 - **Tech support** – person who is able to drop everything and help someone who is struggling. Make sure participants have their phone to call or text if they are having issues.
- Check in on breakout rooms once everyone is sent.
- Other staffing:
 - Breakout rooms should have a “Host” and hopefully a note-taker.
 - If you will be having worship together, have a specific group that takes on that task. And make sure to include music.

Power Points

Conference Power Point Template

It is a good idea to create a conference PPT template so all your worship slides and conference presentations look the same, have your logo, and any other information on them that will be helpful to participants. You can also use this template throughout the conference to add slides with announcements, breakout rooms, workshops, etc.

If you are sharing a Power Point, make sure you:

- Before sharing, go into the settings, go to Slide Show and select “Set up Show”
- Then select “Browsed by an individual” (window)
- This means that the PPT won’t take over your whole screen like normal.
- It allows you to still be able to see the other windows you have open such as the zoom room, chat, participants, etc.

If you are doing Power Point presentations, make sure:

- They are short and interactive.
- You don’t get stuck on one slide for too long. If you are going to talk about one thing for a while, stop screen sharing and let the people see you talking rather than the slide.

Breakout Rooms

Using Breakout rooms

Using breakout rooms gives participants more time to talk, get to know one another, go deeper into topics, and create affinity with one another. When using breakout rooms you will want to:

- Know ahead of time if you are going to assign people to groups randomly, have them select, or intentionally break them up as the convener.
- If possible, have a host stay in the main room even when people are in breakout groups so that those who need assistance in any way and those in the waiting room can be tended to.
- Post a message in the waiting room letting folks know that you are in breakout rooms and to text the host if they would like to join a breakout room.

There are two options for using breakout rooms.

1. **Random Assignments** – Everyone quickly gets randomly sorted into rooms. You can decide the size of the groups and how many people, but you cannot decide if certain people are in a certain room.
2. **Sorting them into rooms** – This give the participants and host the most control of what room they are entering.
 - a. The easiest way to sort people is by inviting them to “rename” themselves.
 - b. You assign groups a number or letter and then invite each participant to put the number or letter of the group they want to go to at the front of their name.
 - c. They rename themselves by hovering over their own picture and clicking on the blue ... Then, click rename, add your letter or number.
 - d. Once everyone has done that, the host (and only the host) can start sorting people on the back end. It still has to be done manually, but it takes much less time because you are simply lining up all the 1,2,3, into their groups. (We found that for roughly 150-200 people this took about 10-15 minutes to make sure everyone was sorted.)
 - e. Once everyone is sorted and you ready to send them, you click one button and they start to move into their groups.
 - f. Participants do have to “accept” going into that room. A pop up will come on their screen for them to select.
 - g. You may have a few stragglers that you have to help.
 - h. If they don’t see the pop-up for which breakout, have them click on the breakout icon and their group will come up.
 - i. If people selected the wrong group or want to move groups, they can click a button to “Go back to the Main Room” and the host can help them find the right room from there

Communication to Breakout Rooms

- Once everyone is in breakout rooms, the host can send them messages about how much time they have left, what questions they should be talking about, etc.
- We suggest giving them at least a 5-minute warning before groups are brought back.

Bringing them Back

When the breakout time is done, the host can simply press the button to bring the breakout rooms back. This gives them a 60 second countdown before they are automatically brought back into the main room.

Breaks

We found that breaks of 15-20 minutes were sufficient if you are only meeting for 3-4 hours and moving them from plenary to small groups and back.

If you are meeting for a longer period of time, make sure to give them longer breaks.

Fun Tips:

Share music during breaks!

- Put up a slide with information for people coming and going so they know when you are starting again. To play music in Zoom, once you start sharing a slide, go up to the settings, click on the ... (More) and select Share computer sound.
- Set up a crowdsourced or curated list on Spotify and select songs from there.

Invite participants to set up their space before the meeting.

- If you have a theme, invite them to set up their space to bring in the theme.
- Remind them to have water, note taking materials, etc. at hand before starting.
- See also, “Tips for Participants” for more on helping participants be prepared.

More Zoom Tips:

For a delightful primer on Zoom calls from our Scottish Anglican siblings you can click this link:

- <https://www.scotland.anglican.org/coronavirus-updates/zoom-guidelines-and-tips-for-scottish-episcopal-church-use/>

Tips for Participants

- Set up in a quiet room with low traffic patterns from other family members and roommates.
- Be careful of backlighting as it will be difficult to see your face.
- Be careful of what is behind you (bathroom with door open may be a poor choice).
- Close tabs and applications before signing in to help with connectivity.
- We recommend NOT using Virtual Background features as they can be distracting and use up bandwidth.
- Use of headphones/earbuds and mic will increase your ability to hear and will limit background noise interference when you are unmuted.
- Remain muted when not speaking.
- Stop video when outside activities interfere (like bathroom breaks, walking the dog, or driving – DO NOT ZOOM AND DRIVE!)
- Please take no offense when a meeting host shuts down your video or mutes you – we are looking out for you!

Audio Tips

- Even if your device knows which ear gear you are using, Zoom might not agree.
- Use carrot to the right of the Mute icon to get the pop-up as seen on this slide (see cursor at point of purple arrow).
- Choose appropriate equipment. The selections at right show a Bluetooth headset AND microphone selected.

Breakout Groups

- There will be several opportunities to engage in break-out sessions. Some of those sessions will require you to make choices and you will be instructed to CHANGE YOUR NAME.
- When you move your cursor over your own thumbnail picture, with video on or off, you can select a number of items from the “. . .” menu, including rename.
- Moving between break-out sessions takes time and may cause your device to sit and spin.
- Please be reasonably patient. Pretend you are learning to operate. Give it a solid 30-45 seconds before you decide you have been rudely dropped from Zoom before you bail out and re-connect.
- Skill of the Zoom host engaged in sorting and sending, bandwidth, connection speed, and number of participants are all factors in the length of time it takes to relocate in break-out sections.

Who do you call/text if you are having technology issues?