



## Online Meetings Guide

*How to run your political education events / meetings on Zoom.*

### Introduction:

Running your events online isn't rocket science - and the problems you will face and their solutions will be different depending on what you want to organise. From setting up a digital reading group, to running a panel discussion, we've put together this short toolkit to get your online events started.

While there are a couple [different platforms](#) to run your meetings on, we have decided to focus on [zoom](#). This is because we have found it to be the easiest to use (especially if you are not used to running meetings online) and it is more likely to be familiar with your audience. You will also find a lot of what you would normally do during a meeting in person can be replicated on zoom.

Before you get started, think about what kind of meetings you want to be using zoom for. Depending on the frequency, length, and size of your meetings, you will find parts of this guide more or less useful. For smaller organising meetings between friends or colleagues, you may find the [guide created by zoom](#) themselves most useful. But if you are organising a public meeting, with the aim of engaging dozens or hundreds of people, this guide is for you!

### The Basics:

Choose your payment plan:

You will need to sign up to a monthly plan for zoom, paying a monthly fee to use its full services. We recommend either the [pro or business account](#) (£11.99 or £15.99 per month respectively) as they give you unlimited meetings time, allow you to manage your attendees better and increase the limit of attendees to your meetings. Take some time to decide what you think is going to be necessary for your plans!



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For smaller grassroots groups who find running big calls and meetings expensive, The World Transformed is offering our zoom accounts when we are not using them for free!

Just email [finance@theworldtransformed.org](mailto:finance@theworldtransformed.org) with details of what you would like to do and when and we will see what we can do to help!

## Creating your account:

When setting up your account, remember that whatever name you choose will show up as the host of your meetings. If you are an organisation, use your organisation's name when signing up, if you are an individual person, make sure you use a name that you are comfortable with being public.

## Setting up your meeting:

Once you have signed up to zoom and created your account you can start setting up your first meeting!

Sign into zoom using your internet browser (not the app) and head to schedule a new meeting. Create a snappy title and description (making sure it's only two or three sentences long and asks people to sign up to your meeting!). Double check you have the right date and time, and choose the duration of the call (don't worry too much about this, just estimate how long you think it will take).

When setting up choose the following settings:

- **Require Registration**  
*You can collect data from people who attend your online calls just like events in real life. Requiring someone to register means you can communicate with them before your event starts, and can collect their information for your mailing list etc.*
- **No Password**  
*Passwords are only really useful if you want to keep your event private! Make sure you turn off this setting to prevent people getting locked out when they try to join.*
- **Video for host at start on/off**  
*You may want to have your video off when you initially start the meeting while you set up. You can turn it on during the call when you are ready to go.*



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- Video for participant on/off  
*The same goes for your participants, as a rule of thumb, it's better to start with all video off.*
- Set dial in location to UK  
*This will let people call in using their phones from the UK.*
- Mute Participants ON  
*This is extremely important especially for larger meetings. When someone joins your call, they will start off muted and will only be able to unmute themselves if you (the host) lets them.*
- Don't enable waiting rooms  
*This stops people waiting around online while you are getting set up. It also means you can start the meeting a little earlier to finalise any last minute bits and pieces.*
- Do record meeting on my local computer  
*This will automatically record the meeting once it starts, allowing you to upload it to youtube later and share it with people who missed your meeting.*

## Who is who on your call:

On Zoom you have three types of roles; Host, Co-host and participants.

Hosts: Are the main managers of your meeting, they have full powers over the call, and are responsible for starting and ending the meeting. They manage participants (muting them, unmuting them and ejecting them) and also record the meeting.

Co-hosts: Can do everything a host does, apart from starting and ending a meeting. See the technical tips further down to learn more about why co-hosts are so great.

Participants: These are the people who are attending your meeting.

For larger meetings, its better to have a team of people working together to manage your call, whilst smaller meetings (less than 50) are pretty easy to manage if you are doing it by yourself.



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## Starting your meeting:

Depending on the size of your meeting, you may want to manage your participants more or less. If you are running a larger public meeting, it's helpful to start the meeting 10 - 15 minutes before the official start time in order to finish preparing for your event.

Start your meeting and immediately click on the manage participant icon and select mute all. This will make it a lot easier to manage a call with 50+ people as the host and co-hosts will be able to decide who is muted and unmuted.

Get all the computers you will be running the call from logged in and set up as co-hosts. You can set someone up as a co-host by going to manage participants, clicking on their name and then designating them as a co-host.

## Taking Questions:

One of the best things about using zoom is the chat box that is available during your calls! If you have a Q&A section of your meeting, ask the participants to post their questions in the chat, and have one of your co-hosts collect them all. That way people can ask questions throughout the meeting, and you can come back to them at the end.

## Raising your hand to speak:

If your participants want to speak, ask them to use the [raise your hand button](#), which will let the facilitator know they want to speak! Then just write down the order of who will contribute and facilitate your participants just like you would in a real life meeting.

## How to pass out handouts:

If you have materials you want people to take home with them, or an illustrative example of an idea you are trying to explain, you can either:

- a) [Share a file on the chat](#) with your participants. Ideally use a pdf file so it's easy for them to download.
- b) [Share your screen](#) with your participants. This way they can see everything you have open on your desktop, and you can go through any materials together.



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But what about flipchat paper? Whiteboards?

Zoom also lets you [share a whiteboard](#) with your participants! Use this to write up key contributions during your meeting, any topline conclusions and to work out issues with your attendees.

## Accessibility:

Online meetings provide some unique challenges when it comes to making your event as accessible to everyone as possible.

The key to a meeting that is inclusive of everyone is good communication before the meeting and throughout the call. Making sure everyone is familiar with how zoom works is a good place to start, especially as lots of us are less comfortable with technology than others!

Send out some Zoom 101 advice in advance of your meeting so everyone knows how to join. We recommend: <https://eldersaction.org/zoom-instructions> which has a good step by step guide to joining a zoom call.

Once everyone is on the call, check to make sure people can hear you clearly. If you are not sure whether people will know all the tools, it can be helpful to start by asking everyone to mute/unmute themselves and put their hands up and down again. That way you can check if everyone can hear you, if they know how to use the tools effectively and you can quickly figure out who might need a bit more help and a co-host can drop them a private message by clicking on their name in the chat to help them out.

Some other things you can do:

[Closed Captioning](#) - Depending on what payment plan you choose, you can turn on closed captioning for your meeting. This involves assigning someone in the meeting to type what people say so that subtitles can be created in real time.

Check in - Make sure you are constantly checking in with your participants to make sure everyone is ok and following the discussion. You can do this using the chat by just asking everyone to post a thumbs up or a smiling face if they are happy to continue.



## **Facilitating your meeting:**

The principles for good meetings and events are the same online as they are offline, so you don't need to throw everything out of the window! You will just need to find some ways to embed these principles in your online spaces to get the most out of your zoom calls.

Here are a couple principles to keep in mind.

### Prepare for your meeting:

Doing everything you can to get ready for your meeting *before* it starts will help make it a smooth and fun experience for everyone.

Make sure that your camera, microphone and speaker is working before your call starts! Setup a practise call, turn your camera on and check that everything is up to date. There is nothing worse than starting a meeting and realising something on your end just doesn't work!

Check what your participants will be able to see. Make sure that your face is front and centre so everyone can see you, and there are not distracting things behind you (a window, paper with writing on it etc) that will make it harder for your participants to concentrate.

Choose somewhere to host the meeting that is quiet, and ideally where you will not be disturbed. You don't want people coming in and out of your room distracting you and your participants as you speak.

It helps to write down a "Script" for your call, that features a section by section agenda for the call. This includes details on each section, who is going to be saying what and for how long it will run. This script can be as detailed as you like, with some organisations actually writing word for word what they will say in each section to improve their meeting.



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## For example:

<p>19:00 - 19:15 - Welcome and Introduction</p> <p>Who: Deborah and Rory</p>	<p>Rory: "Hello everyone and welcome to our call to discuss this evening, we are so excited for you all to be with us!"</p> <p>"We are just waiting for everyone to get on the call, so while we give them a few more minutes, why don't you open up the chat box, by clicking on the chat icon on your screen, and introduce yourself to everyone! Let us know your name and where you are calling in from".</p> <p>Deborah:</p> <ul style="list-style-type: none"><li>- Outline the purpose of the call</li><li>- Go through the ground rules for the meeting tonight</li><li>- Check that everyone is ready to get started</li></ul>
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The example above shows both a word for word example of how you can write your script (Rory) and a shorter bullet point version (Deborah) of what you want to cover.

For larger calls and meetings (more than 100 people), it is helpful to set up your call with two computers, one (the host) is the computer you will be looking at when talking to your participants. The other (a co host) lets you see what everyone else can see (hopefully you).

This also lets you use the primary computer as your notepad, as you can minimise zoom and read your script / agenda straight off your screen whilst still keeping eye contact (see the technical toolkit below for more information on using multiple computers).



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## Set the rules early:

Before you get started with the main content of your meeting, let everyone know what your rules of engagement are. Make sure they understand how to raise their hand if they have a question, how to use the chat (and when to use the chat) and the kinds of things they are not allowed to say (any abusive, oppressive, or nasty language will not be tolerated). This is to help everyone participate to the fullest they can.

If you are using any specific tools available on zoom, make sure you let everyone know as not every zoom call will be the same.

## Take breaks!

In meetings that last more than an hour it is always a good idea to schedule regular breaks to keep people fresh. It's important to make sure that people actually move away from their screens, so ask them to make a cup of tea, do some stretches and come back in five minutes.

When taking breaks, it can also be helpful to introduce a game to encourage people to come back on time. We like to play the song game, where the last person back in front of their laptop with their hand raised has to sing the first 3 lines of their favourite song. That way you incentivise people to be quick and back in their seats to get started again.

## Prepare for mistakes:

Online calls are highly dependent on using technology to work, and so inevitably things are going to go wrong. Let your participants know that you are new to using zoom, or a little inexperienced, and ask them to bear with you while you figure out any issues that might come up. If they have trouble hearing, or something goes wrong ask them to let you know in the chat so you can help them quickly.

In the meantime, make sure you have some quick discussion tools in your pocket, so that people can continue the meeting while you figure out what is going wrong. Ask participants to discuss a set question in the chat, debate an idea that has come up in your discussions or talk amongst themselves generally.





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It's important not to spend too long on an issue, if someone is telling you they can't hear anything, try and help them if you can, but chances are there is something wrong on their side of the equation. Ask a co-host to message them privately to troubleshoot the problem, and push on with your discussion in the meantime.

Finally, it is always hard to shift from the host speaking to one of your participants. They might be muted, didn't hear you announce their name or left their computer for a minute without telling you! Before you bring a new speaker in, make sure to reach out to them to check they are ready to speak and to wait for the signal. If they aren't responding, just apologise to your participants and move on to the next participant while you wait for them to come back online.

## Make sure everyone is seen

With online spaces it is much easier than in offline spaces for people to remain "hidden", so you will have to get creative about how you make people feel like they're part of a collective space. It can be helpful to start by doing a quick go around (if it's a smaller training/event/meeting), where one person answers a brief question to introduce themselves and then nominates another person on the call to go next, until everyone has spoken. Keep an eye on people joining the call once you have started the meeting, and find a way to welcome them in too.

For larger meetings (100+), asking people to introduce themselves in the chat, and potentially picking one or two people to quickly introduce themselves on the call will also help to create a feeling of being in the same space together. If using the chat, make sure you read out what people are typing and say hello to some people individually!

## Encourage Participation in the chat:

The chat is a fantastic way to add a new dimension to your meetings, providing a space for more discussion, summarising of points, collecting questions, reaching consensus and getting quick responses from people. Especially for larger meetings, try to focus as much participation and engagement on the chat as you can.

Depending on your meeting size, going around and asking everyone to respond to a question can be time consuming. We have found that participants will type shorter



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notes and responses to discussions in your meeting than saying it out loud. You can always copy and paste the discussions later and circulate them as notes as well.

Throughout the meeting, it is helpful to check in and make sure everyone is ok with the way the meeting is going. The chat is a great place for you to temperature check your participants, where they can let you know if things don't make sense or if they are having an issue with their connection. Keep an eye on the chat as the meeting runs in case someone needs your help.

Finally, encouraging people to use the chat isn't just a great way to facilitate your meeting, it also makes it feel more exciting and fun. Seeing a chat filled with people all across the country talking to each other makes us feel like we are part of something bigger than just us. So get that chat going and make it as lively as you can!

## Using google slides for meetings and participatory workshops

You can maximise the ways people are able to participate in a meeting or workshop by using other tools such as google slides. Using slides which everyone can edit as you go means you can replicate online many of the activities you would use offline for collecting and sorting ideas, information and opinions. These tools are particularly helpful in supporting you to gather ideas from larger groups where there's not enough time for everyone to share ideas verbally, and to help you break up group dynamics such as a small number of voices in the group dominating the conversation.

You'll need to use google drive to create slides, and share the link to the slides with your participants along with your zoom meeting link. Make sure you choose the share link option which allows everyone with the link to edit. Training for Change's [advice on building online rooms](#) includes [template slides](#), which provide a fantastic starting point and can help you to facilitate activities like:

- Brainstorms, where everyone is able to write anonymously on post-it notes which can then be sorted to draw out key themes/ideas
- Spectrum lines, where everyone positions themselves along a line according to their opinions on a statement or idea. This allows you to get a sense of the range of opinions on an issue and then ask individuals from across the spectrum to share their reflections



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- An opening circle, where people “pull up a chair” when they join the meeting. This means the number of participants and their names and pronouns are visible to everyone throughout the meeting- a bit like wearing a name badge!

## Breakout rooms:

Making a session more participatory and interactive will mean that everyone can engage with the subject matter and learn much more. It also helps to make people feel included and seen by other people in the call, which is an important part of effective political education.

[Zoom has a breakout room](#) tool which lets you break out the call into either randomly allocated groups or manually allocated groups (see technical guide below for more information).

Here are some quick tips getting the most out of your breakout groups:

- Tell the groups to do a quick go around and say their names and where they are right now to introduce themselves.
- Ask the groups to choose one person to feedback key points of the group discussion to the whole call once the breakout groups are over.
- Ask the groups to assign someone the role of facilitating the conversation and making sure everyone has a chance to speak.
- Mention that people should be extra aware of the difficulty of seeing when someone wants to make a point through a screen. Using the hands-up function in breakout groups might be a good way to keep track of who wants to speak.
- Think carefully about how much time the groups might need to have a discussion, then add five minutes to that. Don't underestimate the time needed to get comfortable enough to have a good discussion. Feeling safe to speak around someone may take a little bit longer online.

## Addressing Disruptive Behavior

In real life, part of your job as a facilitator is to make sure everyone feels safe and able to contribute to the meeting fully. If there is someone who is being disruptive, making



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others uncomfortable or just generally being a nuisance, it's up to you to intervene and decide what the best response is. On zoom it is exactly the same.

If you find yourself in a difficult situation, it's important to first reach out to the participant privately on the chat to let them know their behaviour is not acceptable for this space. If you set ground rules at the start of the meeting you can remind them about them and explain how their behaviour contravenes them. This can be a valuable learning opportunity for the participant, who might not understand why their behaviour is unacceptable. It's also useful to check in before taking further action since disruptive behaviour might be the result of feelings of frustration or exclusion from your meeting.

However, if they continue you can and should eject them from your meeting if you think they are making it harder for others to participate. You can do this by clicking on their name in the [manage participants](#) view and choosing remove from the meeting.

Once removed, they will not be able to rejoin later on.

## Preparing your speakers

If you have invited speakers for your meeting, make sure they register for the call with their name so you are able to find them when it is their turn to speak. This is especially important if you have a lot of participants, as you are going to have to search through the participants list to find them otherwise! Make sure they also tell you which email they have used to register for the call, as you can use that to search for them as well.

It helps to set up a whatsapp group or other channel for communicating with your speakers before the meeting starts to keep in touch and explain how the meeting is going to work.

## Introducing your speakers:

When you hand over the floor to your speaker, make sure you (or your co hosts) are ready to unmute them before they start speaking. It is also important to [make sure their video is pinned](#) if you are recording the calls. That way everyone can see them while they are speaking. Remember to unpin them again when they are done.



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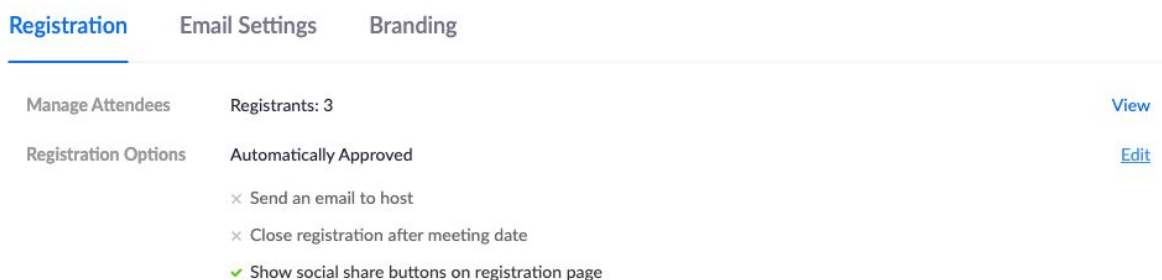
If for whatever reason your speaker is having trouble unmuting themselves, try and move on to your next topic / speaker, and have one of your co-hosts either call them to find out what the issue is, or see if there is another way for them to participate in the call. Sometimes computer's just don't work, so asking your speakers to instead call in using their phones can help you get around sound issues.

## The technical side of things:

We have tried to identify and explain some key technical aspects of running zoom meetings for activism and organising, but as always, zoom themselves have a very comprehensive guide to sorting out the tech side of your meetings. We recommend clicking around their website to get the in-depth information on how to [get the most out of zoom](#).

### Collecting and importing data from zoom sign ups

You can collect data from your meeting participants from zoom signups. To customise the info you collect, scroll down to the bottom of your scheduled meeting, click on registration and then click "Edit" (as seen below).



If you are collecting data, make sure to include a GDPR compliant permission question. You can do this by clicking "custom questions" and then writing out your own. Make sure it is phrased so that your participants can answer yes or no.



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We use:

“Can The World Transformed contact you in the future about upcoming events, updates on our work and ways you can support us? For more information see our privacy policy [here...](#)”

## Branding

You should notice at the bottom of your meeting you can also add your own branding or logo to your meeting. This will make your signup form for the call look a little more official, so it's well worth uploading a logo or banner. Click on “Branding” and then upload your images as a png file.

## Hack for sending a reminder for the call

We have discovered a little trick that lets you remind everyone who registered for your call to join you. A couple hours before your call, edit your meeting and change the title of the call to something like “Title STARTING IN 30 MINUTES”. Zoom will then ask if you want to notify your participants of the changes to your call (click yes), and then send an update to everyone's email inbox. You can (and should) do this at least once to remind people about your call. This will mean more people show up!

## Physical Set Up

If you are running a smaller meeting / event, a single laptop with a host is usually more than enough (although it can never hurt to have someone else as a co-host!).

For larger meetings (100+) it is usually better to setup three laptops as follows:

Laptop 1: co-host, placed in front of speakers, use the camera from this laptop for the call, use this laptop to display the script of the call.

Laptop 2: place next to laptop one, display the call on this laptop so you can see what everyone is seeing, check you're always all on camera as expected and they're seeing what you want them to see etc.

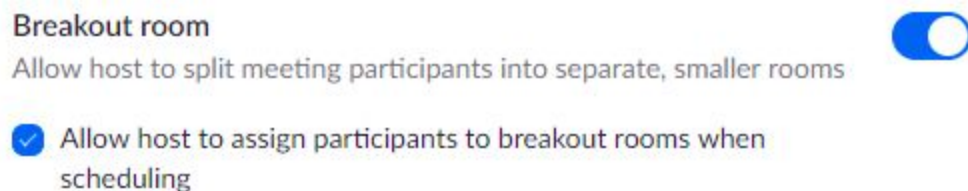


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Laptop 3: Make this laptop the host, off screen, needs super good internet connection , this person should be in charge of adding hosts/guests if they're joining the call, and posting key links into the chat box. They are also the person responsible for troubleshooting any technical issues.

## Breakout Rooms

In advance of your call, [enable breakout groups](#) in your account settings. You can do this by signing into the web portal as someone with the power to edit account settings and clicking on Account Management > Account Settings. Find the breakout room option on the meeting tab and make sure breakout rooms are enabled.



**Optional:** tick the box to allow the host to assign participants if you would rather choose who goes into which group. If you don't have a preference it may be easier to let zoom assign participants randomly.

## Managing Breakout Rooms

You can split participants into as many groups as you want up to 50. You can use this feature for up to 200 participants if you have the Large Meeting add-on.

As mentioned earlier you can:

- Randomly assign people
- Preassign people into groups before the meeting(see above)
- Assign people during the meeting (you may want to use this to place a moderator or facilitator in each group)

Each breakout room has their own chat as well as full audio, video and screen share capabilities. You can set how long you would like breakout groups to be formed for and send a two minute warning when the breakout groups are about to end. The host can



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also jump into different breakout groups to check on the conversation and can also broadcast messages to all the groups.

**More information** on managing breakout groups during a call here:

<https://support.zoom.us/hc/en-us/articles/206476093>

## Recording your calls

When setting up your meeting, it will ask you if you want Zoom to [automatically record](#) your calls. If you are running lots of meetings through zoom from different laptops, choose the “Record in the cloud option” so that your team can all access the videos. If it's just you, click “record on local computer”.

When running meetings that you want to record, you will need to be careful about including the faces of your participants in your video. This is because it can be legally problematic (due to GDPR) for you to release recordings to the public of peoples faces without their permission.

Try your best to make sure that whichever computer is recording the call (it is normally the host) can not see any faces that should not be recorded. This makes it a lot easier to upload your videos with no editing. Alternatively, you can let people know you will be recording the call at the start, and ask anyone who does not want to be recorded to switch off their video.

## Troubleshooting

We will be periodically updating this resource with new troubleshooting advice as and when we find common issues activists face. If you have an issue and its solution that is not covered here (or by zoom) please email [info@theworldtransformed.org](mailto:info@theworldtransformed.org) and we will add it to the list!

Starting your call too early:

It's extremely easy to start a zoom call too early, do not panic! If it happens its going to be completely fine. Just click end this meeting and the call will go back to where it was before the mistake. As long as you end it BEFORE the time the call was scheduled to





finish, it won't delete the meeting, and all the data from the people who registered will not be lost.

## Checklist for your calls

### Before

- Write your script (Optional)
- Send a reminder using the zoom hack
- Soundcheck and video check (15 mins before)
- Decide who will be playing what role on your call if there is more than one of you
- List any links, resources or materials you want to post in the chat in one place
- Add any branding to your registration page
- Edit your signup questions for data collection

### During

- Introduce yourself to your participants
- Set out the rules of engagement, how you will be using zoom and how its going to work
- Check that everyone is able to hear you, and everyone knows how to use zoom
- Schedule Breaks

### After

- Import the data from zoom into your mailing list and email everyone a copy of your recording, any final thoughts and thank them for joining.
- Reflect on what went well and what didn't to improve for next time
- Email us at [info@theworldtransformed.org](mailto:info@theworldtransformed.org), let us know how it went and if you found this guide useful. Also let us know if there is anything we have missed!



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## Other Resources:

Zoom Getting Start Guide - From Zoom

<https://support.zoom.us/hc/en-us/categories/200101697>

Covid-19 Tech Handbook, Online Events Resources - Created by [Newspeak House](#)

[https://docs.google.com/document/d/1bAWv3PvDWD-kXKMwtr\\_gGe3ukkkKSZd92hfNkHmfVCul/edit](https://docs.google.com/document/d/1bAWv3PvDWD-kXKMwtr_gGe3ukkkKSZd92hfNkHmfVCul/edit)

Guide for Online Facilitation - from Acumen

<https://docs.google.com/document/d/17aRkZbsQtojvitvhVjFxFxNeByJyS9Ht0UDUbIVv4FMLY/edit#heading=h.kn2blnv7nhky>

Quick Tips for using zoom

<https://zapier.com/blog/zoom-tips/>

Tools for change - online facilitation toolkits

<https://www.trainingforchange.org/tools/?topic%5B2%5D=2&searchbox=>