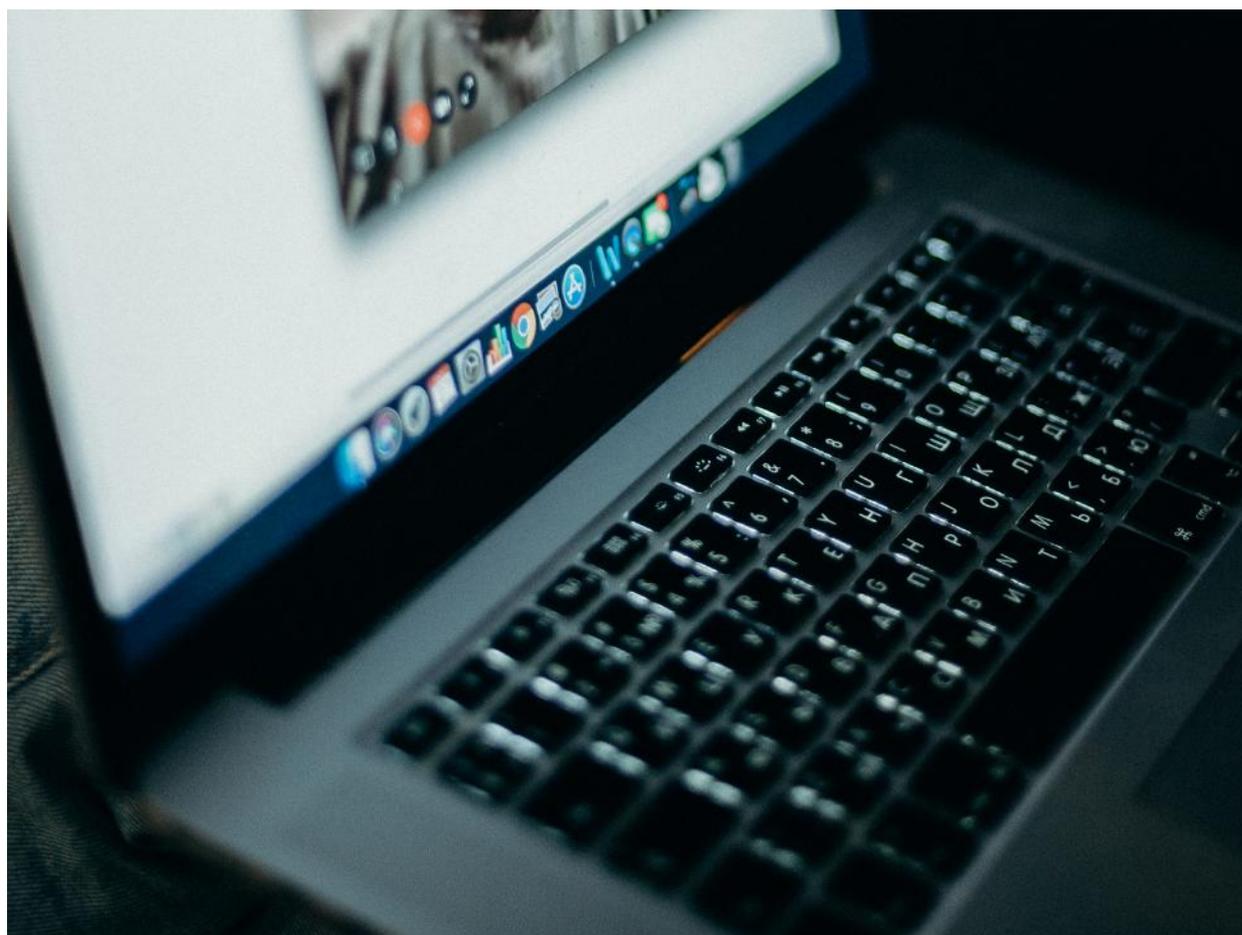


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Virtual Programming Best Practices

Using Zoom



“Just try new things. Don’t be afraid. Step out of your comfort zones and soar, all right?” –

Michelle Obama



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Your Platform

At MCL, we use Zoom, and we decided on that for a few reasons:

1. Many people are familiar with Zoom and how it works.
2. Participants are not required to have an account or even download an app.
3. The controls and mechanics of sharing screens is much easier to work with than other online meeting systems we were familiar with.

Zoom's Pro Annual subscription is \$149.90/year and has customizable settings to be as secure or unrestricted as you feel comfortable with. We have most of the settings pretty locked-down for security. Participants join and can only access chat, and their video and microphone are off.

You can schedule unlimited meetings, have co-hosts (and even leave those meetings if you are going to allow other organizations to use your zoom account), and up to 100 people in those zoom meetings. This is plenty for us; we've never really come close to reaching this capacity. You can also record the meetings to the cloud and share the links, or you can record to a local device and upload to YouTube.

The Webinar feature is an extra add-on, but it allows you to implement event registration, which gives you the ability to screen or limit registrants by age (for example, in the case of a 21+ event) or by location (if you are restricting to town residents only). It also has some handy reporting tools, and you can email registrants about the event. However, if you have a system for event registration already in place, it's not a necessary expense. Webinar settings are also considerably more locked-down, and will allow for better security. It will also allow you the flexibility of lifting some meeting room restrictions for more casual programs or use by outside parties.

Equipment

It doesn't take much equipment you don't already have to host a Zoom meeting. Check out Zoom's System Requirements [here](#).

1. Camera and Microphone: Many laptops come with them built-in, but if you don't have a laptop or the ones you do have don't have a native microphone and camera, there are a number of webcams with built-in microphones, like [this one](#).
2. Computer: Zoom will install and run on even very old PCs and Macs, but the older your computer, the more it'll impact the quality of your video. I'd recommend at least Windows 7, but ideally Windows 10.
3. Internet connection: Your internet plan should support audio and video streaming. While possible to run a Zoom meeting on the bare minimum internet plans, you will experience lag and disconnection issues, so check with your provider.
4. Extras: For demonstration programs, consider a [2nd webcam](#) and an adjustable [mount](#) to stream a close-up view of the demo space. The two linked items are compatible, but by no means the only way to set up multi-cam in zoom. You can also use a smartphone joined into the meeting as a participant or an HD camera with a video capture card.

Scheduling

Don't be afraid to try out different times to schedule! Consider who your audience is and what time of day might be reasonable for them. Thankfully, you *don't* have to consider is travel logistics or your building hours!

Morning programs may work better for Kids programs if you're getting nannies, stay-at-home-parents, and tech-savvy grandparents. Adult programming might be hit-or-miss.

Afternoon programs have the ability to catch late risers, kids after school, and adults that work the night shift. As more adults go back to work, though, you may see attendance waning.

Evening programs may be best for Teens and Adults, especially if your adults work the day shift. Consider an evening program that begins at 8PM. If you can run the program from home, you don't even need to be in your library building!

Working with your Presenter

Some things to talk about with your presenter:

1. Time and Date of program.
2. Are you the presenter of this program? Consider working with a co-worker to serve as a moderator so you can focus on your presentation.
3. How comfortable is your presenter using Zoom? You might want to schedule a test-run so they can get a handle on how to share their presentation, what to expect when they join the meeting, ensure that their technology is sufficient for the zoom call, etc.
4. Does your presenter plan to use their own Zoom account? If so, how will they handle registration?
5. Ask if the presenter wants you to moderate. I usually recommend it, especially if the presenter is unfamiliar with Zoom, but some who are more comfortable like to handle it themselves. More details on moderating later.
6. Does your presenter have a Social Media presence? Ask if you can put them in your Facebook event as a co-host, and ask them to share that event on their Facebook page. The cross-promotion can help your event get more visibility.
7. Payment should be agreed upon in a written agreement. The MCL agreement says that payment will be mailed out on the day of the presentation. Details and paperwork should be finalized and signed well enough in advance to get checks signed in time. Make sure your form includes where to send the check and the Payee.
8. If you'd like to offer a recording of the program for participants who missed it, you should ask your presenter up-front. Some will agree with no restrictions, but some paid performers will not want the program recorded, or only agree with restrictions. This should be in your agreement as well.

Preparing an Introduction with Housekeeping Rules

It's a good idea to prepare a short introduction to start off the program and keep participants informed. Below are typical components I use to introduce the program, lay down housekeeping rules, and introduce the presenter.

Slide 1: Title Card. Include a background image, program title, presenter, photo credit (if applicable) and Library Logo. If your presenter has a logo as well or other promotional material, you can incorporate it into your title card. I've found that using this image as the Event Image for social media/online posting works well.

Background Image: Ask the presenter to provide you with one from the presentation or from their own promotional media. Otherwise, try finding an appropriate royalty-free image (pexels.com is a great resource) and credit the artist.

Example:



Slide 2: Housekeeping rules:

- Audio Alert: I let participants know they are muted.
- How to ask questions (discuss with presenter before-hand): This is usually in the chat window, but you may feel comfortable opening up microphone permissions to small groups.
- A recording disclaimer (if applicable)
- Reminder to send chat to "All Participants" (for webinars, "All Panelists and Participants")
- Optional: Code of Conduct disclaimer, Transcript availability (see last section)

Example1:



Slide 3: Consider a feedback survey for your participants to fill out, and dedicate a slide to promoting it. This will help you know who is attending your program and help you plan future programs. You can use a simple [google form](#), survey monkey, or whatever survey method you are comfortable with.

Example:



Slide 4: Presenter introduction. Have a few lines to introduce who your presenter is, their qualifications and/or accolades, and a picture or organization logo.

Example:

Your Presenter

- * Liz Barbour has been cooking professionally in the Boston area since 1992 and started The Creative Feast in 2004. Liz's cooking demonstrations and recipes have been featured on New Hampshire Chronicle, Channel 9's "Cooks Corner" and in various publications, including New Hampshire Magaine. In 2017, Liz Published her first cookbook "Beautifully Delicious: Cooking with Herbs & Edible Flowers."



Consider including the highlights from this introduction in the meeting chat so people who have joined late can also be informed. If a lot of participants have joined late and the chat has been active, it's a good idea ask the presenter to pause for a minute to go over important points again.

Advertising your Virtual Program

There are lots of avenues to advertise. Be sure to use as many social media outlets as you can handle to get word out as well as all of your regular outlets still available.

The Write-up

- In addition to all the standard information: time, date, etc., be sure to include information on how participants can join the program.
- If registration is required, include a link to where participants can register.
- For Invite-only programs, like book discussions, include how participants can request a link to the event.
- If registration is not required, it is safe to post the one-click meeting link. The settings outlined below reduce the likelihood that your meeting will be zoom-bombed. However, if you choose to lift restrictions and want to allow participants more engagement, you'll want to enforce a registration process.
- Don't forget to include how to join by telephone! Some participants won't have working speakers and otherwise wouldn't be able to hear the presenter. I've definitely had at least one call-in participant for over half of my virtual programs.

- All of this information is available in your zoom meeting's details page. In the section "Invite Link". Click "Copy Invitation" and it will copy everything to your clipboard. Paste into a Word document and edit what you want to share.

Library Blog, Calendar, and Newsletter:

- Carry on as usual!

Social Media

Facebook:

- Create your Facebook event as soon as program information is finalized.
- Don't forget to post the event on your library's page after you've created it! Your Facebook followers may not think to check your events page, so posting the event will make it likely to come up in their news feed.
- Consider joining local Facebook groups to share the event to: Local happenings groups, news pages, related hobby groups, etc.
- Be sure to make your presenter a co-host if they have a social media presence so they can share the program with their followers.
- Don't just post/share your event once. I recommend 4 weeks out, 1 week out, and the day before, as well as a quick 30-minute alert post with link.

Eventbrite

- It's free to post events to Eventbrite as long as tickets are free.
- Posting on Eventbrite will allow Google to find your events, and they could come up in Google searches.
- Eventbrite works with Facebook for ticket "sales", but be careful of participants' privacy.

Other: Instagram, Twitter, TikTok, Tumblr, Snapchat

Physical

- Flyers: You can post them in the windows for walk-by patrons or around town if possible. Be sure to include a QR code to the Facebook event, blog post, or event registration form.
- Sandwich Boards: Advertise to your curbside pickup patrons!
- Local Paper: Don't forget to submit a press-release to your local paper.
- Phone: If your library has an automated phone greeting, consider adding an option that will play a recording of current program offerings. List the event's Title, time, date, a brief summary, meeting ID and Password. The phone number is the same for all Zoom programs unless you've

sprung for a toll-free phone number, so put that at the beginning of the recording. This is helpful for patrons who don't have internet access, but might want to listen to a program.

Starting the Meeting

1. Start: At least 10 minutes (but ideally 20 minutes) before the program start time, go to "My Meetings" in your zoom account and start your meeting.
2. Get Settled: Your settings should have video and microphone turned off, and a waiting room enabled. Pull up your participant's window and your chat window, and disengage them from the main window. I like to have 2 screens for this, so I can have the presentation on one screen, and the participant and chat windows on the other, plus maybe a word document if I'm keeping track of questions; however, a 2nd screen isn't necessary.
3. Admit your Presenter: Keep an eye on the participant's queue for your presenter, and make sure you know what name they're joining the meeting with. You should aim to have your presenter join at least 10 minutes (but ideally 20 minutes) before the official program start time. This allows you to take care of audio and visual testing, as well as screen-sharing and answer any last-minute questions.
4. Make your presenter a co-host: Once you admit your presenter from the waiting room, give them co-host status by using the actions by their name in the participant's window. They can now turn on their camera and microphone.
5. Turn on your microphone and camera: if you haven't already!
 - a. Demonstration/Workshop programs: If you are presenting a craft demonstration or similar program, you can set up multiple cameras to give your participants a close-up view of your workspace. Here's a [video tutorial](#) on how to set up Multi-Camera in Zoom Meetings. Another option is to log into the Zoom using a tablet or smartphone and give that device co-host ability.
6. Screen-share your Welcome slides: If you have welcome slides prepared, open your presentation document, then return to zoom and bring it up on screen-share. Do not share your desktop, as you may inadvertently reveal private information.
7. Set Participant settings: Be sure to disallow participants from un-muting themselves and re-naming themselves. You can set these options by using the controls in the participant's window.
 - a. Discussion Groups: You don't have to do this for discussion group programs. It's a good idea to make these types of programs invite-only, so once you admit participants, you can direct them to turn on their cameras and proceed with the discussion. However, it is good practice to have participants stay muted if they aren't speaking to cut down disruptive background noise.
8. Fix any last-minute issues: Use the 10 minutes before the presentation to clear up any questions or technical concerns. When you're ready to begin the program, you can "Admit All" from the waiting room. If you used registration or an invite list, you can check names against your sign-up

sheet and admit one-by-one. However, be aware that many participants may not join with a name that matches their registration.

9. Begin Recording: If you're recording, it's a good idea to give the participants who have already joined a heads up that you're going to begin recording. Once recording, start your introduction.
10. Begin Program with Introduction: After your welcome speech, end your screen share and allow your presenter to start theirs. Mute yourself and turn off the camera so you don't take over the screen during the presentation. If you're going to ask questions during or after the presentation, just unmute yourself, then mute again when finished.

During the Meeting/Moderating

Even if you aren't presenting personally, I recommend staying throughout the program to enforce good behavior, record attendance statistics, and be on-hand to provide technical assistance if necessary.

Keep an eye on the chat window for questions or inappropriate comments, and the participants window for latecomers. If a participant is behaving badly, you can remove them in the participant's window with the action items next to their name. The settings outlined in section 9 prevent them from re-entering the meeting.

It's not possible to permanently turn off cameras for participants unless you're using the webinar feature. I recommend simply making the request for cameras to be turned off, and enforcing this by turning them off yourself if you have anyone who missed the request, accidental camera activations, or someone who is behaving badly. Repeated offenders can be booted from the meeting. You can control this through the participants' window.

If you're moderating questions for the presenter, it's a good idea to discuss how to handle questions with the presenter beforehand. Do they want you to interrupt them with questions? Will they pause for questions? Will there be a Q&A segment at the end?

If you're interrupting, try to wait for a natural break in topic, but don't wait too long. If they move on too quickly to the next topic, you'll just have to interrupt ASAP so they don't have to go back too far in their presentation.

If your presenter is pausing for questions or taking them at the end, it's helpful to have a word document open to record chat questions. If there's a lot of chat discussion, you may lose questions if you rely on the chat only.

Even with encouragement, participants might not submit any questions until the end. I recommend coming up with 2-3 questions yourself so there aren't any awkward pauses while participants write their questions in the chat.

After the Program

1. Ask for Feedback: Consider asking your participants to fill out a brief survey to help you plan your programs. You can construct a simple survey with Google forms and share the link in the meeting chat. You can include this request in your housekeeping rules segment of your introduction and/or at the very end.
 - a. A feedback survey is a great way to get impressions from your participants, see who is attending them (something we can't do visually), and get suggestions for new programs. You can also include a newsletter signup option so participants can stay informed!
2. End Recording: After your final thanks to your presenter and a final goodbye to your participants, you can end the meeting, which will also halt the recording.
3. Share Recording, if possible: If you've recorded the program, it should be available within a few minutes. If it's hosted on Zoom, you can share the link by going to the recording tab and clicking the share button by the correct recording. Many of the settings are optional, and they can be customized for each recording. Each recording's settings will depend on your arrangement with your presenter.
 - a. Be sure to disable "viewers can download" to protect your presenter's and the library's intellectual property.
 - b. Copy the sharing information, and share the link as agreed upon with your presenter. If allowed to share publicly, you can post the link directly in the Facebook event and everyone who responded will get a notification that you've posted in the event.
 - c. If not allowed to share publicly, be sure to post instructions on how your patrons can view the event if they missed the program.
 - d. If you've saved the recording to a local drive, you can upload it to YouTube, Facebook, or other video hosting website, but keep in mind your presenter's terms and adjust your settings appropriately.

Zoom Meeting Settings

The following settings are recommended to protect participant privacy and prevent zoom-bombing. This isn't an exhaustive list of every setting, so if it isn't mentioned then the choice is your preference. Also be aware that as Zoom updates, some settings may be renamed, added, or removed.

- Start meeting with Host video OFF
- Start meeting with Participant video OFF
- Select Audio Type: Telephone and Computer Audio
- Disable Join Before Host

- Unauthenticated users can join meetings (even from web client)
- Require a password when scheduling new meetings
- Embed Password in Invite Link for one-click join
- Require password for participants joining by phone
- Mute participants upon entry (Once the meeting starts, you can disallow participants to unmute themselves)
- Allow meeting participants to send messages to all participants
- Prevent participants from saving chat
- Disable private chat
- Disable chat auto save
- Disable file transfer
- Allow co-host
- Restrict Screen-share to Host
- Disable annotation, whiteboard, and remote-control
- Allow Nonverbal Feedback
- Disallow removed participants to rejoin
- Disallow participants to rename themselves
- Enable Hide Participant Profile Pictures in meetings
- Enable Report Participants to Zoom
- Disable breakout rooms
- Disable remote support
- Enable Save Captions
- Enable Virtual Background
- Enable Waiting Room for Users not in your account
- Hosts and Co-Hosts can admit participants from the waiting room
- Customize your waiting room logo and welcome message
- Allow participants to join from browser

Zoom Recording Settings

If you're going to record your program, it's recommended that you use the following settings for security of your presenter's and your library's intellectual property, and participant privacy.

- Disallow participants to record locally (I have local recording turned off, since we record to the Zoom Cloud)
- Cloud Recording:
 - Record Active speaker with shared screen
 - Don't save chat messages
 - Display participants' names in the recording
 - Record Thumbnails when sharing
- Disable automatic recording
- Enable password to access shared cloud recording

Accessibility

Closed Captioning and Transcripts

You might want to consider having accessible options for participants who are hearing impaired. This setting can be turned on or off in the Zoom Meeting settings.

[Otter.ai](#) is a service that provides a live-generated transcript of zoom meetings. The auto-captioning isn't perfect, and it has about 80% accuracy. This goes down if the presenter uses specialized terms or jargon, so medical programs are problematic since it's not smart enough to recognize names of medicines, procedures, or most scientific terminology. Otter.ai is a transcript generator, so it won't show up as traditional closed-captioning. There's live-stream alert at the top of the zoom call, and the transcript can be opened in a separate window. It's not perfect, but it's something to make the program a little more accessible to people who are hearing impaired. Here are [instructions](#) on how to set it up.

If you want more traditional closed-captioning, be warned: this isn't a free service.

[3Play Media](#) is a good company that provides closed captioning services live or post-production. The live captioning integrates much like Otter.ai does, but setup is a little more complicated. 3Play has lots of tutorials and guides to get you started, as well as responsive customer service and live webinars. Live captions are \$0.60/minute and are computer-generated (about \$36 for a 1-hour program). They measure between 80-85% accuracy. Post-production captions are \$2.50/minute (about \$150 for a 1-hour program), and are guaranteed to come back with 99% accuracy.

Interpreters

Consider hiring an ASL interpreter for your patrons. If you do hire an interpreter, remember include them in your introduction. Make sure you direct patrons to turn on "Speaker View" once they have joined so they can see the presenter as well as the interpreter at once.