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PLANNING MULTIROOM ONLINE GATHERINGS (MOG)

A guide to help your team plan its next multiroom online gathering

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PLANNING MULTIROOM ONLINE GATHERINGS (MOG)

This document is a tool for those who wish to host, multiroom online gatherings using web conferencing software such as Zoom. This document is especially helpful in situations where orchestrating concurrent meetings of two or more is desirable. Teams of conference organizers are encouraged to use the checklist below to guide or support their group planning. While this document cannot anticipate the need of every gathering, it should provide a strong foundation and lead to discovery of considerations that may be particular to the gathering in question.

Some types of gatherings this tool may be applied to include:

- Online Conferences
- Online Workshops
- Graduation Ceremonies
- Employee Development Days
- Career Fairs
- Online Orientations
- And more!

This document is separated into a 4-part checklist with accompanying guidance. The 4 parts include:

1. Foundational Event Planning
2. Pre-Event Planning
3. Day-Of Event Planning
4. Post-Event Planning

Guidance for each portion of the checklist can be found in the latter half of the document. Hyperlinks are provided for quick navigation.

What this document is: this will *help event organizers identify and plan for the functional and organizational components needed for hosting multiroom online gatherings.*

What this document is not: this is *not a how-to guide for hosting effective online meetings.* There are many guides on the web that provide suggestions on effective meeting facilitation and synchronous pedagogy. Persons who wish to learn more about hosting effective online meetings are encouraged to connect with their local web conferencing administrator or seek these resources out.

Definitions:

Gathering: an assembly of people.

Event: (in this document) a temporally defined instance of a gathering.

1. Foundational Event Planning

1.1 What is the goal(s) of your MOG?

1.2 Which web conference service do you intend to use? (e.g. Zoom, GoTo Meeting, etc.)

1.3 How many virtual conference rooms will you need?

Corollary Question: What is the needed capacity of each room?

1.4 If these conference rooms will all be created by a single person, who is that person? If these conference rooms will be created by multiple room hosts, who will organize those rooms hosts and collect their room information?

1.5 How many hosts/moderators/technicians will you need to manage the rooms throughout the event?

of Hosts:

of Moderators:

of Technicians:

2. Pre-Event Planning

2.1 Will you be collecting RSVPs for this event, and if so, which tool will you use? If you are not using RSVPs, how will you anticipate your attendance?

Yes No

Corollary Question: If you collect event registration, will you also ask attendees to register for individual sessions during the event? If so, will you bundle session registration with event registration, or will they be done separately?

Corollary Question: Who will set up and manage the RSVPs?

2.2 How will you communicate with prospective attendees leading up to the event? (check all that apply)

- | | |
|----------------------------------|---------------------------------------|
| <input type="checkbox"/> Website | <input type="checkbox"/> Social Media |
| <input type="checkbox"/> Email | <input type="checkbox"/> Newsletter |
| <input type="checkbox"/> Other | |

Corollary Question: How many times will you communicate with prospective attendees leading up to the event, and will you automate any communication?

Corollary Question: Who will manage the communications to prospective attendees?

2.3 How will you preconfigure your meeting rooms to encourage/discourage interaction? For instance:

- Will participant microphones be muted upon entry? Yes No
- Will participant video cameras be disabled upon entry? Yes No
- Which interactive tools will be used in the meetings? *Attendees will use:*

<input type="checkbox"/> Microphones	<input type="checkbox"/> Interactions / Non-verbal feedback
<input type="checkbox"/> Chat	<input type="checkbox"/> Share screen
<input type="checkbox"/> Annotations	<input type="checkbox"/> Polling

<input type="checkbox"/> Other <ul style="list-style-type: none"> • Will you ask participants to use their real names in the meetings? <input type="checkbox"/> Yes <input type="checkbox"/> No
<p>2.4 Will you create a guidance document for meeting room hosts and co-hosts? (<i>this is highly recommended</i>)</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>2.5 Who will review all the event materials for accuracy, including URLs, instructions, duties, etc.?</p>
<p>2.6 Will you need to provide any legal disclaimers, image releases, or intellectual property licensing ahead of time?</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <p><i>Corollary Question: If “yes” which kind of documents will you need to create and distribute?</i></p> <input type="checkbox"/> Legal Disclaimer <input type="checkbox"/> Image/Photo/Video Release <input type="checkbox"/> Intellectual Property License / Release <input type="checkbox"/> Other:
<p>2.7 Will you provide a pre-event survey to gather diagnostic data from your attendees?</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <p><i>If yes, refer to section 4.1 for guidance on preparing survey questions.</i></p>

3. Day-Of Event Planning

<p>3.1 Who will share the presentation content during the meeting(s)? (check all that apply)</p>
<input type="checkbox"/> Hosts will share <input type="checkbox"/> Presenters will share <input type="checkbox"/> Participants will share
<p>3.2 How will you communicate with attendees (outside of meeting rooms) during the event?</p>
<input type="checkbox"/> Message Board <input type="checkbox"/> Intranet

- Twitter Hashtags Email
- Other

3.3 How will you provide access to attendees and ensure security?

- Will passwords be required for room entry? Yes No
- Will waiting rooms or a similar form of admittance be used? Yes No
- How will attendees access conference room URLs and location information, and where will they go during the conference to find information about accessing rooms?
- How will you prepare your room hosts to respond to potential meeting disruptions like inappropriate behavior?
- If a social disruption occurs during a meeting, what is your response plan to ensure continuity?
- If a technological disruption occurs during the meeting (like an outage), what is your response plan to ensure continuity?

3.4 What instructional materials will attendees use to learn how to navigate the conference website and meetings?

- A walkthrough video An instructional document
- Email instructions Instructions on a website
- Other:

3.5 How will you ensure all conference content is accessible for attendees?

- Do your digital conference materials meet [WCAG 2.1](#) accessibility standards?
 Yes No

- Have you provided presenters and other content creators any guidelines for creating accessible content?
 Yes No
- Have you made arrangements to have sign language interpreters, translators, or other assisting professionals present if a request for accommodation is made?
 Yes No
- Have you tested to ensure the web conference environment can feature or spotlight a sign language interpreter?
 Yes No

Corollary Question: Who will ensure the accessibility needs of conference attendees are met?

3.6 How will you assist participants who are lost or are experiencing technical difficulties?

- | | |
|---|---|
| <input type="checkbox"/> Phone line | <input type="checkbox"/> Technical support meeting room |
| <input type="checkbox"/> Real-time chat | <input type="checkbox"/> Social Media (Whatsapp, Twitter, etc.) |
| <input type="checkbox"/> Text messaging | <input type="checkbox"/> Other |

Corollary Question: Who will be the designated drop-in support person?

3.7 How will you create a welcoming environment in each meeting room?

- Will there be a designated greeter in each meeting room to greet each attendee?
 Yes No
- Will hosts deliver a consistent welcome message in every room to kick off the meetings (either verbally or in writing), or will hosts deliver their own unique welcome messages?
 Consistent Unique

Corollary Question: If consistent, who will write this welcome message?

- What tools will you use to create meeting room ambiance as attendees are entering?

- Music
- Images/Slide
- Other

3.8 How will you document the event meetings?

- Will you record the meetings? Yes No
- Will you designate note takers in the meetings? Yes No
Corollary Question: What tool will the note takers use to take notes?
 - OneNote
 - MS Word
 - Other
- Will anyone take screen captures of the event meetings? Yes No
Corollary Question: Who will take these screen captures?
- Will you collect slide decks and other presentation materials from presenters?
 - Yes NoCorollary Question: Who will collect these materials?

3.9 How will you address challenges that arise during your event? (firefighting)

- Will you set up a communication backchannel to notify conference organizers when a problem is occurring?
 - Yes NoCorollary Question: What backchannel tool will you use for messaging?
 - MS Teams
 - Text messaging
 - WhatsApp
 - Discord (or other telephony)
 - Other
- Will you designate a problem solver (i.e. “firefighter”) whose job it is to address technological and organizational problems when they arise?
 - Yes NoCorollary Question: Who will be your firefighter?

3.10 Will your online event have flow?

- Do meetings logically flow one to the other to create a complimentary experience, or are sessions largely not complimentary by subject matter?

Complimentary Not Complimentary

If complimentary, how should attendees ideally weave the various experiences together?

4. Post-Event Planning

4.1 How will you measure whether your online event is successful or not?

- What relevant data points will help you determine success, and must the data be collected before, during, or after the event?
- Will you conduct a post-conference survey of attendees?

Yes No

If you answered "yes" to the previous question:

- What questions will you ask?
- What survey tool will you use?
- How will you distribute the survey?
- Who will author and distribute this survey?

4.2 Will you share records and materials from the event with persons after the event is over?

Yes No

Corollary Question: Which tool will you use to share these record and materials?

Website

Intranet (i.e. Sharepoint, etc.)

Email

File Share Service (i.e. Dropbox, Google Docs/Drive, etc.)

Other

Corollary Question: Who will share the records and materials with persons after the event?

Checklist Guidance

1.1 What is the goal(s) of your MOG?

Every gathering is unique. Some gatherings intend to inform, while others intend to educate. Still others might be focused purely on facilitating engagement between participants. Whatever the purpose of your online gathering, being clear about your goals up front (and sticking to those goals) is as critical to online event success as it is to traditional event success. Each time a goal is added or altered, there can be cascading effects that may require reconfiguring meeting rooms, guidance documents, and personnel. That's a lot of extra work!

Some questions to ask of each goal:

- Is the proposed goal realistic given the available resources, including time and personnel?
- Does the proposed goal affect the team's ability to accomplish any other goal?
- If the team moves forward with this goal, what are the benefits of moving forward with it weighed against the drawbacks?

[Return to checklist question >>](#)

1.2 Which web conference service do you intend to use? (e.g. Zoom, GoTo Meeting, etc.)

Although web conferencing services share many similarities, there are often distinct differences at the feature level. Features include things like the use of polling, annotations, file sharing, reaction / emojis, and more. Features often dictate which kind of interactions will be possible during your gathering and which interactions will not be. Whichever service you choose, be sure to have someone on your planning team who is well-informed on the service's feature options.

[Return to checklist question >>](#)

1.3 How many virtual conference rooms will you need?

This number may vary depending upon factors such as number of available hosts, number of proposed presentations, length of the gathering, etc. Web conference services may also restrict the maximum number of participants that can be in a room at one time. Only you can determine the right number of virtual conference rooms based on resources, personnel, time, available content, and service restrictions.

[Return to checklist question >>](#)

1.4 If these conference rooms will all be created by a single person, who is that person? If these conference rooms will be created by multiple room hosts, who will organize those rooms hosts and collect their room information?

Regardless of which direction you choose from the two options above, you will have a designated person orchestrating the creation and organizing of all the meeting rooms. This person should be someone with good communication skills and attention to detail.

[Return to checklist question >>](#)

1.5 How many hosts/moderators/technicians will you need to manage the rooms throughout the event?

This will be determined in part by the team's response to 1.3, however, when considering how much support may be needed for any given meeting, consider the number of expected participants and the kind of interactions that will occur.

For instance, if a one-to-many presentation will occur with a single presenter engaging in Q&A, then a single host may be able to juggle managing the environment and facilitating the Q&A. However, if the purpose is to separate a group of 50 participants into groups of 10 in breakout rooms, more facilitators may be needed to help facilitate smaller group discussion. Regardless, having a social facilitator paired with a host focused on the technology is generally a best practice (meaning you will have at least two personnel in each meeting room).

Definitions

Hosts: Hosts operate the technology in the meeting room, such as managing participant roles, controlling screen sharing, and other functionality within the meeting. The host's primary focus is maintaining the operation of the web conference environment.

Moderators: Moderators help to facilitate the social aspects of a meeting, such as group discussions and Q&A sessions. The moderator's primary focus is on creating a welcoming and social experience.

Technicians: Technicians ensure continuity of the web conference environment, and often (though not necessarily) have *administrator access* to the web conference service. When hosts are unable to troubleshoot or solve a technical problem, the technician is there to ensure every technical challenge is met with a solution.

[Return to checklist question >>](#)

2.1 Will you be collecting RSVPs for this event, and if so, which tool will you use? If you are not using RSVPs, how will you anticipate your attendance?

In general, any RSVP service that meets your needs will do. However, if your circumstances preclude the use of an RSVP service, it is usually wise to use some means of estimating attendance. Some options include counting pre-conference survey submissions, number of visits to a web or intranet site, etc.

Some events benefit from not only event registration (i.e. *who is coming to the event*), but from session registration (i.e. *which sessions do they plan to attend*) as well. Some RSVP services offer pretty sophisticated branching options that allow you to bundle multi-step registration (Eventbrite, for example), but these often require a fee for this capability. A bundled option is usually preferable as it provides the most seamless multi-registration experience, but if you must unbundle event and session registration, give some thought to how you will guide registrants through that process to ensure no one gets lost along the way. This could be done through linking one registration page to another, personal outreach by email, or any other method you choose.

[Return to checklist question >>](#)

2.2 How will you communicate with prospective attendees leading up to the event? (Check all that apply)

Considerations:

- What is your audiences' preferred communication channel?
- How often will you provide communication?
- Will any communications be automated (i.e. 24-hour reminder prior to the event, RSVP confirmation, etc.)
- If you are hosting a multiregional or international event, how do time zones impact the timing of your communications?

Multiregional and international events should choose a time zone reference that incorporates both the [time zone abbreviation and the UTC offset](#) (e.g. Central Standard Time = CST / UTC-6), and should use this consistently in the event schedule and all communications. Provide a link to a [time zone calculator](#) to help attendees calculate when meetings are occurring in their local time.

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2.3 How will you preconfigure your meeting rooms to encourage/discourage interaction?

For instance:

Web conference service configurations are always a tradeoff. Every restriction placed on use confines your participants' ability to interact. Your planning team will need to determine the right balance between restricting interactive features for safety or communication purposes, and keeping interactive features available to enable participant interactions.

For example, while *restricting screen sharing* privileges can prevent participants from accidentally or intentionally sharing content, it also means participants will need to interject requests to share during the meeting and the host will need to manage sharing privileges.

As another example, while *locking down access* to a meeting room can prevent late or unwanted guests from entering your meeting once it begins, it also means that any participants who lose connectivity during the meeting will also be unable to reenter.

It is recommended that you let users decide when to engage their audio and video. This respects privacy and people's differing comfort levels in online environments. A best practice is to *mute audio and disable video for all participants upon entry* (they can then choose to enable either or both). This will also help to minimize meeting disruptions (e.g. barking dogs, keyboard typing, etc.).

Most web conferencing environments allow users to choose a guest name upon entry to a meeting and/or change their name once in the meeting. If you plan on encouraging discussion in a meeting, encourage your participants to use their real names for reference and transparency.

[Return to checklist question >>](#)

2.4 Will you create a guidance document for meeting room hosts and co-hosts? (This is highly recommended)

At the beginning of this document it was noted that this is *not a how-to guide for hosting effective online meetings*.

The guidance document for meeting room hosts and co-hosts is. An [example of a guidance document for meeting room hosts and co-hosts](#) is appended to this document.

[Return to checklist question >>](#)

2.5 Who will review all the event materials for accuracy, including URLs, instructions, duties, etc.?

After weeks of planning, building, and planning some more, it can be easy to skimp on final event preparations and rest on your feelings of accomplishment. Don't. Have two team members click on every link to check for accuracy, have two more review all the event instructions for personnel and attendees, and schedule that last-minute conference call with all the personnel to make certain every person understands their role. Your firefighter will thank you (see 3.9).

[Return to checklist question >>](#)

2.6 Will you need to provide any legal disclaimers, image releases, or intellectual property licensing ahead of time?

Whenever digital records are being created there bound to be questions surrounding reasonable expectations of privacy and rights to the digital records created. The number of cases where this applies are too numerous to handle within a document like this, but to help your team get started, consider some of these concerns:

- Do you intend to record people's faces during your event, and if so, do you intend to exhibit their faces to third parties afterward?
- If meetings are recorded, will attendee lists be visible in the recordings, and will attendees have concerns with their attendance being recorded in the meeting?
- Will content delivered during the event (e.g. presentations, demonstrations of methods, trade secrets, etc.) be available for digital redistribution in accordance with the content owner's wishes?
- Is there a risk of protected information such as personally identifiable information (PII), financial information (e.g. PCI), learning records (FERPA), etc. being exposed at any point during the event, and if so, what is the prevention and mitigation plan?

Every event and industry will have some unique areas of concern related to data and privacy. Privacy as it relates to recording web conference environments is dealt with briefly in [3.8](#).

[Return to checklist question >>](#)

3.1 Will hosts share the presentation content during the meeting(s), or will presenters share the content?

This is typically a matter of preference. If room hosts present the content, then the event organizers will need to collect the slide decks and other materials ahead of time and provide them to the room host(s). If presenters are comfortable sharing their screens, then presenters can be depended on to present their own content.

Some web conference services allow for remote control of content so that multiple participants can manipulate what is being shared. If multiple presenters will be presenting content, then the organizing team will want to consider the best way to leverage the sharing features of the service, or depend social cues to manipulate content (i.e. “Can we go to the next slide please?”).

[Return to checklist question >>](#)

3.2 How will you communicate with attendees (outside of meeting rooms) during the event?

You may need to communicate updates to participants during breaks, lunch hours, or in between days. Participants may also seek out information during these periods.

Considerations:

- What is the quickest means to get the participants urgent information?
- Where are participants likely to go looking for information first if they have questions?
- Is there a catch-all for participant questions? (see 3.6)

[Return to checklist question >>](#)

3.3 How will you provide access to attendees and ensure security?

Web conference disruption (sometimes called “Zoombombing” after the popular web conference tool Zoom) is a serious challenge for large online gatherings, especially those that advertise the event publicly. The questions posed in this section are meant to help an organizing team develop a framework for ensuring basic security. Here are some best practices to help guide responses to these questions.

1. **Never share web conference meeting URLs publicly** on websites, social media, or similar public facing media. This is the number one way meeting disruptors (Zoombombers) learn of online meetings. Carefully share meeting URLs so they aren’t easily obtained by web bots or nefarious persons.
2. Whenever possible, **use dynamically generated URLs for meeting rooms**. Avoid using static URLs which are often associated with a user single account. This practice will ensure static URLs associated with individual user accounts will not be compromised.
3. Provide all hosts and participants with **guidance on what to do should a conference disruption occur**. In general, hosts should immediately end any meeting that receives a disruption, but afterwards, everyone needs to know where to go and what to do

next. Should they plan on reconnecting in the same room? A different room? By phone? Provide that guidance up front.

4. **Communicate conference security and privacy expectations** to all participants. This include policies about sharing sensitive information online like room URLs. It may also include information around screen capturing, no-fly-zone topics, etc.

[Return to checklist question >>](#)

3.4 What instructional materials will attendees use to learn how to navigate the conference website and meetings?

The structure and flow of your event content and web pages may make sense to you, but that doesn't mean they will to the participants. Provide participants a quick flyover of how to navigate your online gathering. A 2-3 minute walkthrough video often does the trick, but other multimedia can be provided as well or as an alternative.

[Return to checklist question >>](#)

3.5 How will you ensure all conference content is accessible for attendees?

Accessibility is one of the most easily overlooked aspects of online meeting prep. Ensuring all content meets basic requirements related to color contrast and font sizing is key to serving all participants.

The majority of WCAG standards will not apply to your event content, but it is highly recommended that someone on your team review the [WCAG standards overview](#) to determine where attention is needed. Color contrast and font size will be your principle concerns, followed by other accessibility requirements such as clean audio, live captioning and transcripts.

It will also be important to have a plan in place to provide sign language interpreters or other assistive personnel. Having these personnel available on-call and short notice will allow you to respond to last minute requests for accommodation. Be sure to make these people part of your overall communication plan. Also be sure to test your web conferencing environment ahead of time to ensure you can adequately feature a sign language interpreter. Web conferencing software is often programmed to spotlight speakers, but because sign language interpreters do not speak, you may not be able to depend on the software to ensure interpreter visibility.

Increasingly, web conferencing services are providing real-time transcription options. These include having a person transcribe in real-time (either a staff member or a hired stenographer), or in some cases, using a machine transcription service (not always available).

[Return to checklist question >>](#)

3.6 How will you assist participants who are lost or are experiencing technical difficulties?

Expect some of your event attendees to get lost, and expect others to get frustrated with technology. This is likely to happen in at least a few instances, and when it does, it is crucial to have a place for attendees looking for help.

Minimally, you should provide a phone number that people can call if they are experiencing technical problems, keeping in mind that if they cannot get the web conference software working on their computer, they cannot drop into a technical support meeting room. For the best of all worlds, it is recommended you establish technical support meeting room with an integrated phone line and have a staff member in the technical support room to take calls throughout the event. The phone number and technical support URL should be prominently featured in as many sensible places as possible, including on your event webpage, in the event program, and in email communications that go out to attendees.

[Return to checklist question >>](#)

3.7 How will you create a welcoming environment in each meeting room?

The checklist above provides some suggestions for creating a welcoming environment. Do not be constrained by these options. Consider your audience and what would make them feel welcomed and inspired entering a meeting room - then do that.

[Return to checklist question >>](#)

3.8 How will you document the event meetings?

When considering how you will document your event, it is important to consider what a person's reasonable expectation of privacy might be. It can be tempting to video record or take screen captures of meetings since these provide excellent records of proceedings. However, if recording video or taking screen captures would violate your participants' reasonable expectation of privacy, then it may be best to avoid these. Laws such as the Family Education Rights and Protection Act (FERPA) can add other layers of consideration to these circumstances. If you do decide to record or screen capture your meetings, consider building a waiver into your registration process.

Notetaking in the cloud is an excellent practice, especially if you anticipate multiple note takers collaborating. [Microsoft OneNote](#) and [Evernote](#) are two such services, but other options are available as well. At minimum, consider assigning a note taker to each meeting, even if they are taking hand-written notes to digitize later.

Saving chat sessions and other event communication channels are also recommended.

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3.9 How will you address challenges that arise during your event? (Firefighting)

Big things can go wrong during online events. What happens if an incorrect meeting room URL is published and attendees end up in the wrong place? What if a room host has an emergency

during the event and a new room host needs to be found? What if a meeting room is not configured properly and a new one needs to be rapidly created in its place?

Big problems like these can cause events to fall apart, and when/if they happen, it is important to have someone on standby to tackle them immediately. Ideally, this will be your best performing technologist who has full administrator rights to your conference service and an intimate knowledge of how the event is supposed to unfold. Suffice it to say, your “firefighter” should be an integral part of the event planning team, because they may be called on to save the day (quite literally).

It is recommended that you do not assign any other responsibilities to this person for the day other than to standby and wait for something to happen. Setting up a backchannel communication line through a tool like Microsoft Teams chat will give all conference personnel a direct line to the firefighter.

[Return to checklist question >>](#)

3.10 Will your online event have flow?

Event flow is like narrative flow. When structured properly, attendees will move from one meeting to the next, taking with them what they learned in the previous meeting, and effectively applying it in the next. When the pieces all fit, the entire event flows like a gentle stream.

Many (and perhaps even most) online events don’t work like this, and instead, they feature loosely related presentations organized thematically (like a traditional conference). However, if you do intend to create flow in your online gathering, give thought to the names of your meeting rooms, the layout of your digital program, and the wayfinding instructions hosts may give at the beginning and end of the meetings. Event flow is art and architecture – so wear your creative cap.

[Return to checklist question >>](#)

4.1 How will you measure whether your online event is successful or not?

Event surveys are a standard of almost every event, but too often they are an afterthought or a box to be checked. An effective survey should gauge whether your attendees have learned anything new or gained value from your event. One way to do this is through pre and post surveying, and this involves intentionality. You may want to ask identical questions in both surveys to measuring changes in knowledge or perspective. Alternatively, you may want to ask reflective questions in the post survey that ask persons to build upon information they submitted in the pre survey. However you decide to approach it, be sure to align these questions to your goals stated in 1.1.

When an event is moved online some measurement capabilities can be unlocked through analytic tools. For instance:

- # of meeting room attendees
- # of unique attendees during the entire event
- Duration of meetings
- Polling results
- # of questions posed through a Q&A tool
- Social engagement as measured through chat entries

This is a non-exhaustive list of data points that may help you further gauge event success. These do not take the place of a traditional surveys, but when positioned alongside them, they can provide a more powerful representation of impact.

[Return to checklist question >>](#)

4.2 Will you share records and materials from the event with persons after the event is over?

Whether and how to distribute materials after an event is for the event team to determine. Regarding recordings – in addition to privacy concerns, there may also be intellectual property concerns to consider, especially if you have a keynote speaker. Many presenters make their living through their knowledge and content, and they may not permit the sharing of that content beyond the live event. Be sure to check in with presenters ahead of time and have them authorize sharing of recorded presentations prior to sharing them.

[Return to checklist question >>](#)

Credits

This document is a product of the Minnesota State colleges and universities system and includes contributions from the following professionals:

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APPENDIX A: SAMPLE GUIDANCE DOCUMENT FOR MEETING HOSTS AND CO-HOSTS



**FUTURE
FOCUS
20/20:
Supporting Adult Learners**

Zoom Host and Co-Host/Facilitator Guide

This document provides an overview of the role and responsibilities for each Zoom Room host and co-host at the Adult Learning Institute event on Monday, May 18, 2020.

ROLES AND RESPONSIBILITIES

Host Role

The role of the Zoom Room **host** is fairly straight forward - The host manages the core functionality of the environment.

Host Responsibilities

1. Before you begin, please ensure that you are logged into your MinnState Zoom account. Once logged in, generate a Random Meeting ID. Do NOT use your Personal Meeting ID.
2. Create a Zoom Room for hosting a breakout session and email the link to T3@inverhills.edu. You will be setting up for one or two specific breakout sessions. Please follow the [Settings for Zoom Meetings](#) below.
3. Perform essential host functions such as
 - recording the meeting once the meeting starts
 - adjusting permission levels for users: ensure that the presenters are listed as co-hosts so that they can share their screen
 - creating and populating breakout rooms
 - watching the cameras for hackers and turning off any participants exhibiting illegal or suspicious behavior
4. Be the primary communicator to the event organizers.
5. Share presenter(s) desktop with attendees.
6. Provide technical support to participants.

7. Count the number of participants, excluding the co-host and presenter(s).
8. If needed, set up breakout rooms during the presentation.
9. If needed, assist with Polling.

Co-Host/Facilitator Role

Hosts may grant co-host permission to as many persons in the room as they choose. Co-hosts can assist the host with social functions and provide light technical support.

Co-host responsibilities

1. Arrive 10 minutes prior to session starting if possible and create a welcoming environment for all attendees by participating in chat and leaving web camera on.
2. Welcome participants and engage in moderate conversation as participants join the session.
3. Introduce yourself and explain that you will be moderating the chat. Encourage people to mute themselves and use the Pin or Speaker View. Remind people that if they get disconnected to rejoin using the ALI Zoom Links document. Read provided Statement of Purpose.
4. Briefly introduce the presenter(s) for the session and turn the session over to the presenter.
5. Ask the presenter to share their screen if needed.
6. Facilitate a discussion in the room (**this is not the job of the host**) including monitoring the chat box, alerting the presenter to questions, being prepared to ask questions if needed to invigorate conversation. If anyone posts links or resources in the chat, copy them and send to the presenter afterwards.
7. Provide support to the host by assisting participants with questions or requests if needed (both about Zoom and not about Zoom).

Presenter Role

Presenters are not responsible for the technical or moderating aspects of the presentation so that they can focus on presenting. Presenters are receiving further directions and tips.

Presenter responsibilities

1. Prepare a breakout session that is informative and interactive.
2. Introduce yourself to your co-host/facilitator. Decide how you would like to take questions during the session. Let them know if you plan on using the polling feature, breakout rooms, or the whiteboard annotations.
3. If using a power point or other visuals, have them ready.
4. If anyone posts links or resources in the chat, the co-host will copy and send to you. If helpful, you may want to add to your presentation document.
5. After the institute, send your presentation to T3@inverhills.edu. We will post them on the conference website.

SETTINGS FOR ZOOM MEETINGS

Please use the following settings

1. Use the meeting feature (rather than webinar) and use these settings:
 - Name the session: your choice
 - Generate Meeting ID automatically rather your personal room
 - Video: on for host and participants
 - Add a password: Adult (case sensitive)
 - Video: on for host and participants
 - Audio: both telephone and computer audio
 - Enable join before host and enable waiting room: off
 - Only authenticated users can join meeting: off
 - Mute upon entry: on
 - Record the meeting automatically: off
 - Alternative hosts: Add the Co-host/Facilitator and Presenter as an alternative host
 - In your settings, under In Meeting (basic):
 - a Allow chat and private chat, automatically save chats
 - b Play sound with participants join: off
 - c Co-host: on
 - d Polling: on
 - e Show meeting control toolbar: on
 - f Show Zoom windows during screen share: on
 - g Screen sharing: allow host only
 - h Annotation: on
 - i Whiteboard: on; auto save whiteboard content on
 - j Remote control: on
 - k Nonverbal feedback: on
 - l Join different meetings simultaneously: on
 - m Allow removed participants to rejoin: off
 - n Allow participants to rename themselves: on
 - o Hide participant profile pictures: off
 - p Allow only authenticated participants: off
 - In your settings, under In Meeting (Advanced)
 - a Breakout Room: on; allow host to assign participants on
 - b Closed captioning: on

- c Virtual background: on
- d Waiting room: off
- e Show “Join from your browser” link: on

HELPFUL TIPS FOR HOSTING YOUR ZOOM ROOM

Don't Panic – There Will Be Bumps

Remember – there are varying levels of expertise with this technology, we are all learning together. Be patient and show grace to yourself and others - this is the inaugural *online* Adult Learner Institute. The unpredictability of both the numbers and the comfort of people with the technology means we may be making stuff up on the fly (along with everyone else).

You are the steady voice of calm. Remind people that this is a first for everyone, and refer them to the ALI mindset and vision in the participant guide.

You Have Support!

If you have questions, need assistance, or are simply getting panicky, there are two ways you can get some help.

Use the Teams backchannel chat –

This [Microsoft Teams chat channel](#) is only for hosts and cohosts. If you are in immediate need of some backup, leave a message here. We will support one another. John Bayerl from IHCC is our Event Support and will be monitoring the chat.

Refer participants to the drop-in room –

A [Technical Support drop-in](#) Zoom room will be a catchall area for all participants. Folks in this room can help troubleshoot audio issues or even schedule one-on-one sessions to assist participants with educational technology and online learning questions. If a participant needs some one-on-one support, consider directing them to this room.

Share technical guides –

- [Zoom Audio Troubleshooting Guide](#)

Contacts and Links

Below is a listing of persons who have agreed to Host and Co-Host Zoom rooms.

Name	Email	Host / Co-Host	Zoom Room



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