USING ZOOM FOR
DIGITAL MEETINGS

A GUIDE FOR PENNSYLVANIA AGENCIES
Bent Creek Services

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Although every attempt has been made to give accurate information and guidance, this guide does not constitute legal advice and is not a substitute for legal advice from your legal counsel.

This guide is created by Bent Creek Services (BCS) to help Pennsylvania agencies in transitioning their meetings from a physical location to the digital video conferencing platform, Zoom. Zoom also offers a robust guide to its webinar platform which is available for viewing at the following link: Getting Started with Webinars. Zoom also offers a step-by-step guide for scheduling and customizing webinars which is available for download by clicking here.

This guide is organized into four sequential steps for transitioning an agency from meeting physically to meeting digitally: assess, plan, test and launch. The guide embeds recommendations from BCS as well as links to Zoom-created tutorials on specific actions or topics. This guide may be useful for agencies transitioning to digital platforms other than Zoom although specific settings and options may not have counterparts on alternative platforms.

Step 1: Assess

Assess Team
We suggest one additional role to what every agency currently has when holding agency meetings, a Zoom webinar host. We recommend that this role is not assigned to someone who already has responsibilities within the agency meeting. Instead, we recommend someone from your staff with an aptitude and familiarity with technology and Zoom in particular to be the designated Zoom host to run the platform and troubleshoot any technical issues that may arise for attendees during the meeting.

The Zoom host should run the Zoom platform and manage related devices by muting/unmuting speakers, and troubleshooting any technology/platform issues that arise during the course of the meeting.

There may be others who are helpful to this effort. After reading through the accessibility and accommodations section of this guide, you may decide additional roles and staff are necessary.

Assess Technology
We recommend that agencies use agency-provided devices and accounts when possible. This addresses some security concerns and allows agency staff to more effectively support and troubleshoot technology issues that may arise.

The following questions could begin an assessment of current technology capacity as well as any potential challenges to be addressed in transitioning to a digital meeting on Zoom's platform.

• Do agency members and staff have agency-provided devices with internet access, microphone and speaker capabilities?
• If not agency-provided, do agency members each have mobile phones, tablets or computers with these capacities? What is known about these devices and their capabilities?
• Do agency members have an appropriate location where background noise or other interference can be minimized and nothing inappropriate will appear in the background of their video image?
• Does the platform used for providing meeting notices in compliance with the Sunshine Act have the capacity to display a link to the Zoom webinar?

- Will your community have wireless or other internet access to join the meeting and submit public comment? If not, could the agency provide a wireless access point that provides access, or has the agency identified other community locations that have wireless network availability?

Assess Timeline
Once agency leadership staff have assessed both the human capacity and technological capacity for this transition, a timeline for planning, testing and implementation should be created and communicated to the team, including the agency governing board. Remember your requirements for public notification.

Step 2: Plan
Zoom Webinar or Zoom Meeting

Zoom offers a Webinar or a Zoom Meeting option. Note the key differences in Zoom's own chart (left).

To see a full comparison of features, visit the following Zoom resource: Meetings vs. Webinars.

For agency meetings, we recommend using the Zoom Webinar format to allow for agency staff and leadership to be designated as "panelists" which offers more control in participating in the meeting than those in the public audience who are designated as "participants." Attendees can only participate in the webinar meeting when granted access by the Zoom host.

For agencies who need to reach a larger public audience, livestreaming offers that option. Zoom allows webinars and meetings to be livestreamed. We recommend that if agencies choose to livestream through another platform (like Facebook or YouTube), agency leaders consult with their information technology (IT) staff and any policy regarding acceptable use of technology to ensure those platform settings follow agency practice and policy. We recommend that comments be turned off on livestreaming platforms that allow comments. This way the public is not commenting on the livestream expecting to have a response and the comment section does not become a distraction to the livestreamed meeting. The purpose of the livestream is to widen opportunity for the public to view the meeting, not to provide an alternative and unlimited comment window.

To set up a livestream option for your agency meeting in Zoom, please click the following link for a step-by-step tutorial: **Livestreaming Meetings or Webinars Through a Custom Service.**

To see the overview of Zoom-defined roles in a webinar and roles defined for meetings, visit the following links: **Roles in a Webinar** and **Roles in a Meeting**.

The following are several important features you will want to consider when deciding to use Zoom Meeting or Zoom Webinar.

Zoom Meeting
- In Zoom Meeting, participants are more difficult to manage because each has control of muting/unmuting their participation at any point. The Zoom host could remove participants, but with hundreds of potential participants, both those who do not understand how to navigate the platform and those who are looking to assert themselves, this could be highly disruptive to an agency meeting.
- Agency leadership and staff do not have any additional privileges or designations — they are assigned as participants. This could make roll call and voting more difficult.
- During public comment, members of the public would need to use the Chat feature to indicate their desire to be recognized. The chat box is the only method to communicate without unmuting to speak.

Zoom Webinar
- Agencies should be clear that if members of the public wish to issue public comment during the meeting, they should register early to secure spots as meeting participants. In the communication with the potentially larger public of observers, agencies should communicate how members of the public can view the livestream and communicate to the agency through alternative means (i.e., agency email and/or agency staff phone numbers).
- Panelists — agency leadership and staff — may unmute their participation to speak or the host may unmute their participation. Other participants are unable to unmute to potentially disrupt or talk over an agency leader or staff member.
- The Raise Hand feature can be used by members of the public to indicate their desire to submit public comment. The Zoom host can acknowledge them and unmute for their public comment.

It should be noted that anyone joining Zoom meetings or webinars via their phone (using the dial-in number provided after registration) may not be able to use the Chat, Raise Hand, or Q&A features. This may not allow a member of the public joining only by phone to submit public comment. An agency is obligated to afford a reasonable opportunity for public comment but is not obligated to ensure that everyone in the community can do so at all times. We recommend you

consult with your legal counsel and information technology staff to determine whether additional options should be made available for public comment. Members of the public always have other ways to communicate with the agency, via letters, email, etc.

Schedule the Zoom Webinar or Meeting
There are many settings to consider when setting up a digital agency meeting on Zoom. We recommend scheduling with the required registration that issues an automatic approval. In requiring registration, the agency forces email authentication and reduces the potential for spammers disturbing the meeting. By choosing the automatic approval, the agency avoids staff time dedicated to manual approval and avoids a potential public complaint for those who may register right before the meeting but were not manually approved.

Zoom does allow for registration while the meeting is in progress. The agency's Zoom host would want to be aware that members of the public may register late and join throughout the duration of the meeting — just like members of the public may come and go during a physical meeting of the agency.

When scheduling the webinar or meeting, there are several settings to consider. First, Zoom accounts have over-arching settings for each account profile. These settings apply when the account is hosting a planned meeting or webinar. To access these settings, click on the left navigation menu (when logged in via a web browser, like Chrome).
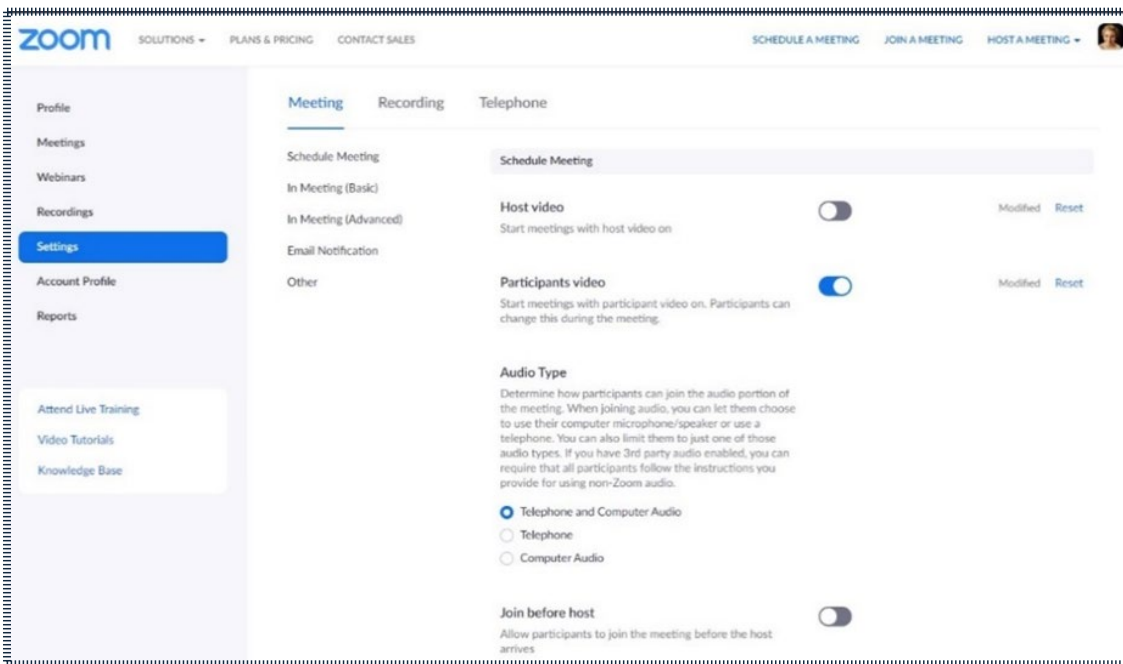
Or, individuals can access these account settings via the desktop app by clicking on the profile picture in the top right corner.
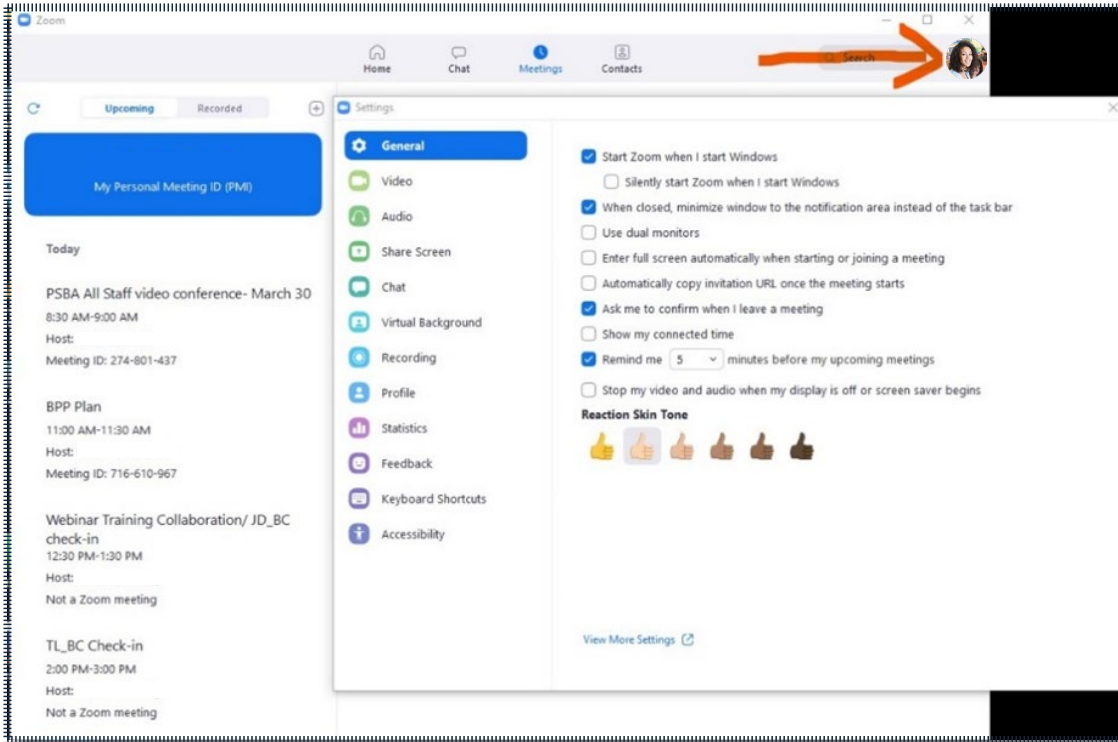
The other settings will be specific to the scheduled webinar or meeting. These settings are chosen when scheduling the webinar or meeting. Webinars have fewer setting options than meetings, making their scheduling more streamlined.

Recommended Zoom Settings when using Zoom Webinar

The following are settings we recommend for an agency's digital meeting conducted through Zoom Webinar. These settings can be accessed through the Zoom account "Settings" as well as through the webinar scheduling process.

- ✓ Require registration (if recurring, for each occurrence) for access to webinar via an emailed link. (Requiring password is a local decision.)
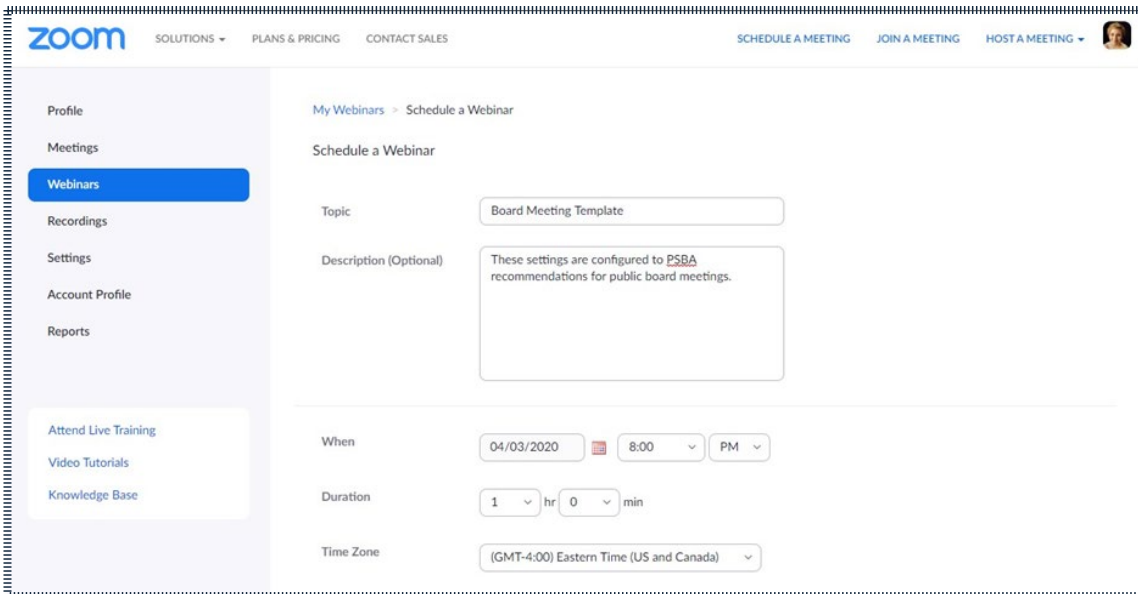- ✓ Set registrations to auto-approve.
- ✓ Enable screen sharing, but limit to "host only."
- ✓ Set panelists' microphones to be muted upon entry. (They may unmute after entry or wait for host to unmute.)
- ✓ Using panelists' video for webinars is a local decision but agencies should consider at minimum having videos turned on briefly during roll call to verify identity.
- ✓ Approve both telephone and computer audio for meetings and webinars.
- ✓ Enable practice sessions. This allows the Zoom host to start the webinar (meeting) early with only the hosts and the panelists present for the "test" meeting. When the host is ready to start the meeting and allow registered attendees to join, there will be a "broadcast" button at the top.
- ✓ Record the webinar automatically (stored on local computer or in the cloud).
- ✓ Invite any intended hosts or co-hosts as panelists. During the practice session of the webinar, invite the co-hosts as panelists and during the practice session of the webinar, open participant panel, scroll over the name of the co-host, click "more" and elevate one or more panelists to co-hosts.

For more on managing settings for participants in a webinar, click on this Zoom tutorial: **Managing Participants in Webinar.**

Additional Zoom Tutorials for Webinar Settings
Scheduling a Zoom Webinar with Registration

To enable and use a webinar practice session: Webinar Practice Session

Recommended Settings when using Zoom Meetings

The following are settings we recommend for using Zoom Meetings. Agencies may use different settings if using Zoom for a staff meeting or purposes other than a public meeting of the agency.

- ✓ Require registration (if recurring, for each occurrence) for access to meeting via an emailed link. (Requiring password is a local decision.)
- ✓ Set registrations to auto-approve.
- ✓ Disable "Join Before Host" and enable "Waiting Room."
- ✓ Disable "File Transfer."
- ✓ Disable "Allow Removed Participants to Rejoin."
- ✓ Enable screen sharing, but limit to "host only."
- ✓ Set chat to be viewable only by host/co-host.
- ✓ Set participants' microphones to be muted upon entry.
- ✓ Set video for participants to be off upon entry.
- ✓ Approve both telephone and computer audio for meetings and webinars.
- ✓ Enable "Waiting room." This feature can be activated as soon as the meeting begins through the "Security" icon on the toolbar.
- ✓ Record the meeting automatically (stored on local computer or in the cloud).
- ✓ Assign co-hosts as backup for meeting hosting and screen sharing.
- ✓ During the meeting, notice the settings available to the host through the "security" button on the bottom Zoom toolbar. Do not lock during a public agency board meeting, but other options may be helpful for a Zoom host to manage participants.

Additional Zoom Tutorials for Meeting Settings
Scheduling a Zoom Meeting

To understand the Zoom host and co-host administrative controls during a meeting, refer to this Zoom tutorial: Host and Co-Host Controls in a Meeting

To understand how to share files during meetings using Zoom platform, refer to this Zoom tutorial: In-Meeting File Transfer

To create a waiting room for meeting session (not available for webinars), refer to this Zoom tutorial: Waiting Room

Step 2: Plan

Distribute Devices, Train Team

If the agency is providing devices, the IT team should have the Zoom app/shortcut and an email app/shortcut easily accessible. Ideally, support in setting up a Zoom account and profile should be provided for agency leadership and agency staff who will join the digital agency meeting or other meetings the agency may hold using the Zoom license.

> Support for setting up Zoom desktop app, desktop client, web client or mobile app can be found on the following Zoom tutorial page: **Getting Started.**

The agency team — leadership, administration, IT staff — should determine what type of training will be possible with staff and agency leadership who may be using the Zoom platform and/or the agency device for the first time. If the agency can't provide devices to agency leadership, training will need to be more individualized as agency leaders will be using personal devices to join a meeting and potentially create their own Zoom account. During training (which could simply be a conversation), ensure that each participant's device has both a working speaker and microphone, at the very least, or determine if a headset or other hardware may be needed. If using a tablet, determine if use of a stylus will be needed to provide better accessibility.

Part of the training should be to ask each member of the team to join a meeting and webinar to use the features in each successfully. Agency leadership should be trained on how to access files and agency materials necessary for the agency deliberation and actions at the meeting. We recommend using agency-provided email accounts to send PDF files, meeting agenda, and other documents referenced during the agency meeting. These trainings should be on the device and on the internet network that the administrator or agency leadership would be using when accessing a digital agency meeting so that potential issues are identified early and solved before the public meeting.

To determine if internet speed or connection may be challenging, the web tool speedtest.net can be used to communicate potential issues to agency IT staff. If connection speeds are limited for any member of the agency leadership, consider using audio only for that person's connection. Sunshine Act compliance does not require that every agency person's face be visible so long as what they say can be heard and they can hear everything said by others.

Publish, Post, Notify

We recommend the following be added to the usual required meeting notice:

- The virtual connection (Zoom link) and/or livestreaming information — this should be placed where you would normally place the location of the meeting in the advertisement.
- Provide suggestions for accessing public internet (if available) in the community, such as library or agency access in parking lots.
- Explanation of public comment process for your digital meeting.

The published newspaper notice could simply state that the meeting will be conducted in virtual mode via Zoom, include the link for the meeting as location and direct people to visit the agency website for additional connection information and details.

Step 3: Test

In Zoom's webinar settings, the administrator of the account can "Enable Practice Webinar" which allows the Zoom host and panelists to practice the logistics of the webinar before broadcasting to the public who have registered as participants. This test webinar should be used to ensure the following are functioning appropriately:

- ✓ Individual sound settings — all panelists/hosts can hear and be heard by all other panelists/hosts
- ✓ Video settings, if being used. Those with videos turned on need to recognize that facial expressions, gaze and background will be viewed by all who participate in the meeting.
    - » Lighting should be in front of them not behind to see their face.
    - » Background movement should be kept at a minimum to decrease distraction.
    - » Camera should be aimed at their face, not ceiling or an inanimate object.
- ✓ Share Screen setting, if being used. All panelists can see the material being shared clearly.
- ✓ Technology troubleshooting — all panelists should test contact through the provided number of the Zoom host or IT staff by calling or texting.
- ✓ Zoom host should demonstrate how to mute/unmute and change the view from Speaker to Gallery.
- ✓ Zoom host can elevate any panelists to co-host or turn over host duties to another.
- ✓ Zoom host should warn panelists that the Q&A panel will be visible. They should not respond, instead allowing the Zoom host to troubleshoot any technology questions that are submitted and direct attendees to the process to submit for public comment per their agency policy.
- ✓ Agency Staff reviews roll call, voting procedures, and reminds agency leadership to state full name when making or seconding a motion.

Participants should be instructed at the beginning that discussion must be limited to testing the platform and technology setup, and that no discussion of agency business is permitted. Every individual should join the meeting from his/her own device to be clearly heard and, if using video function, clearly seen. If multiple members of the agency administration or staff are on-site for the meeting, they should join the webinar/meeting from separate rooms. Joining a Zoom meeting from two devices while located in proximity will cause audio feedback. If joining from the same room is necessary, one individual will always need to stay muted.

It may be wise to assign someone the Participant role in order to test the settings and functions of the webinar from the perspective of a registered attendee who may submit public comment using the Raise Hand or Q&A features of the webinar (or the chat box of the meeting).

To minimize disruption to the meeting due to a technology glitch, is multiple individuals (usually alternative hosts and co-hosts) should have digital copies of materials being shared in the meeting. If one person has trouble sharing materials during the meeting, others could share from their devices. Materials should also be saved locally rather than shared from a cloud drive if possible — this is especially true if the material is a video or large multimedia file like PowerPoint. During the test, the host and each alternative host should test their ability to screen share and access the documents for the meeting.

Step 4: Launch

Welcome & Expectations

If using Zoom Webinar, the host may start early, which allows participants and panelists to join but stay muted until the official start time. If using Zoom Meeting, a waiting room can be enabled to hold those who arrive early until the host officially starts the meeting. Whoever opens the meeting should set some expectations for all attendees by touching on the following:

- Identify the digital platform. "You are joining a Zoom webinar."
- Reiterate the public comment policy; explain how the public identifies and provides public comment via the Zoom platform.
- Explain Chat Box, Raise Hand and Q&A features (if enabled). Explain that questions and chat comments are not visible to anyone other than the host.
- Explain the role of Zoom host to mute/unmute, identify and lower raised hands, and troubleshoot technical issues.
- Announce that a test was conducted for agency leadership and agency staff to test technology and that no discussion of agency business occurred. This is largely to demonstrate transparency and to actively work to build trust as the agency transitions to a new platform.
- Announce that the meeting is being recorded (and, if applicable, livestreamed through another platform).
- Share where the public was provided access to the meeting agenda. The Zoom host can also screen share the agenda.

Agenda

When the agency leader has called the meeting to order, the roll call should occur with each member of agency leadership stating verbally their attendance to comply with agency policy and ensure accurate recording of minutes. Each member of the agency leadership should repeat his/her full name throughout the meeting when making or seconding motions and voting for the same reasons.

Following the roll call and verification that a quorum is participating, we recommend conducting the Pledge of Allegiance by posting a picture of a flag to either the digital agenda or by the Zoom host screen sharing a flag image. By using such opportunities to replicate what happens at normal in-person agency meetings, the agency can lend a sense of decorum and normalcy to a new and potentially awkward situation.
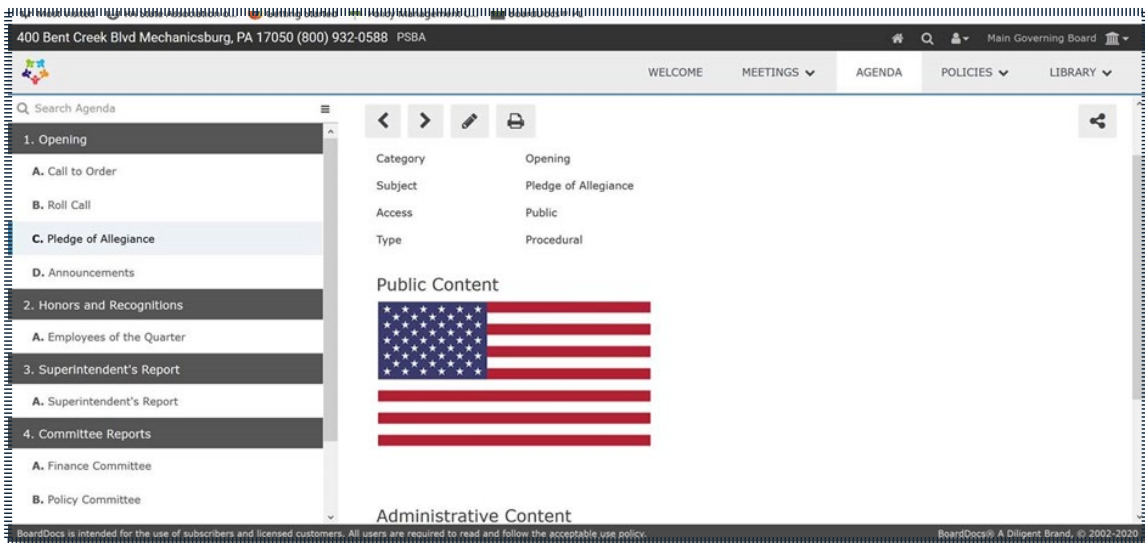
We do not recommend using polling during Zoom meetings of the agency as polling cannot be limited among a subset of participants in the meeting, and therefore would not be a secure or potentially accurate process for submitting agency votes.

To see more about adding polls, visit this Zoom tutorial: **Polling for Webinars.**

The agency leader should announce the occurrence of any executive sessions that have happened since the previous public meeting that were not previously announced, at the place in the agenda where it is the agency's normal practice to do so.

Public Comment
Prior to receiving public comment, we recommend that the agency leader verbally review the agency's rules regarding public comment during a digital meeting just as should happen in an in-person agency meeting. Using the tools Zoom offers in both meeting and webinar formats, an individual should indicate a desire to submit a public comment. The Zoom host can acknowledge this individual, unmute him/her, and begin timing his/her public comment.

As always, the agency can reserve the right to limit the public comment period to a certain overall time as well as limiting individual public comment time.

Some additional considerations and recommendation for public comment:

✓ Public comment is not a question period directed to the agency, but rather a time for the public to submit comments to the agency. In the new digital environment, the Q&A feature may cause individuals to submit questions, expecting a response from the agency during an agency meeting, which is not the purpose of public comment. Therefore, the setting of expectations and reminder of the agency policy on public comment are important.

✓ We recommend using the Raise Hand feature as part of the Zoom Webinar features for the public to be acknowledged for comment.

✓ We recommend agencies consult with their legal counsel before admitting public comment via written statement (email, chat, etc.) that is read at the public meeting.

✓ Video functionality may or may not be available for public comment depending on whether the Zoom Meeting or Zoom Webinar option was chosen for the digital agency meeting. The public should be made aware of this limitation prior to public comment.

✓ As a way of offering additional communication with the public beyond comment during an agency meeting, consider providing an email address or web form where the public can submit questions to be answered by an agency leader before and/or after the meeting.

Additional Zoom Tutorials for Launching Digital Agency Meetings

Webinar: To see how an attendee joins a webinar, visit the following Zoom tutorial:
Joining and Participating in a Webinar as an Attendee

Webinar: For the Zoom host to understand how to manage participants in a webinar, visit the following Zoom tutorial: Managing Participants in a Webinar

Meeting: To start the meeting as the host, visit the following Zoom tutorial:
How do I Start or Join…?

Meeting: To support training of participants joining a meeting, visit the following Zoom tutorial: Joining a Meeting

Accessibility Considerations & Options

Visual Impairment

Zoom is supported by screen reader technology; however, some screen readers may have difficulty recognizing the prompts on the participant interface and users may need some assistance in navigating. It is important that your meeting/webinar materials are also optimized for this technology.

Share any documents and/or presentations that you will be referencing in the meeting/webinar in a screen-readable/modifiable format. PDF files should be created in an accessible format (see Adobe PDF Accessibility).

Be sure that all images used have alt text (alternative text), which is simply a description of the image that is read aloud by a screen reader. It's best to think of this description as the way you would describe the image if you are telling someone about it over the phone.

Regardless of the materials you are sharing, proper formatting is crucial to ensure that the end user can adapt them as needed. For more information on making your materials accessible, you can check out Penn State's Accessibility page or the World Wide Web Consortium (W3C) Web Accessibility Initiative (WAI).

Audio Impairment

Zoom has several features to help ensure hearing-impaired audience members can participate in the meeting/webinar.

If there is a need to accommodate for live closed-captioning, Zoom has the capability to have an assigned host/co-host/panelist (or an attendee in a meeting) type those captions. For more information, check out Getting Started with Closed-Captioning. You will need to ensure the individual assigned to perform this task has adequate skills.

Even if there is no immediate request, you should still have a transcription of the meeting/webinar for those who may watch it at a later time. Zoom automatically transcribes your meetings/webinars (recorded to your Zoom cloud). These are then synchronized to the video recording, allowing the text to be searchable for specific topics in the recording. It would be advisable to review these auto-transcriptions for mistakes. For more information on how to activate this function, please visit, Automatically Transcribe Cloud Recordings.

If you are livestreaming your meeting/webinar on another platform, you can find out more information on YouTube's closed captioning here, or Facebook's closed captioning here.

If you typically provide sign language interpretation at your physical agency meeting as an accommodation for individuals who have made that request, you need to provide that accommodation in the virtual meeting as well and ensure you have video capability to display the individual performing the sign interpretation.

Physical/Mobility Impairment
Zoom has shortcuts and hot keys for those who may have limited mobility. For more information, visit Hot keys and Keyboard Shortcuts for Zoom. Standard tab and arrow keys work well to navigate the Zoom participant interface.

Accessibility

Appendix A: Personal Checklist for Webinar/Meeting Test

❑ **CONNECT YOUR EQUIPMENT**
- ✓ Headset with microphone
- ✓ Webcam/phone camera

We recommend using a headset microphone (included with many phones). This will eliminate feedback issues and minimize background noise.

❑ **TEST YOUR COMPUTER/TABLET/PHONE**

Test your device to ensure that Zoom will run properly. Click here to join a test meeting. After clicking the join meeting link, a prompt to download and run Zoom will appear. Open the downloaded zip file and follow the prompts. Alternatively, download the Zoom app for mobile, desktop or browser prior to joining the test meeting.

❑ **TEST YOUR EQUIPMENT**
- ✓ Turn your webcam on and off.
- ✓ Check your microphone.
- ✓ Mute and unmute your microphone.

For any audio or video issues, follow the instructions in this Zoom Audio/Video Tutorial.

❑ **TEST ZOOM'S HOSTING FUNCTIONS** (For host/co-hosts ONLY)
- ✓ Test screen sharing. For more information, see Zoom's tutorial on screen sharing here.
- ✓ Familiarize yourself with muting and unmuting microphones.

Visit Zoom's comprehensive overview of hosting and co-hosting controls page. For a complete list of Zoom tutorials, please visit the Zoom Help Center.

❑ **SHARE CONTACT INFORMATION**
- ✓ Text or call the number provided from your agency as the technology support (may be Zoom host).
- ✓ Share your number with the technology support person for Zoom (may be Zoom host).

Having an alternative communication channel to access during the live meeting is important if technology glitches or challenges arise.

❑ **CHOOSE LOCATION**
- ✓ Choose a location where you can control sound and movement (as much as possible).
- ✓ Choose a location that offers adequate lighting if enabling the video function.

Sounds that can register as background noise (heating, AC, foot-traffic, etc.) in the physical environment can become very noticeable and distracting in an online setting. Movement in the background of a video can also become distracting. This can be mitigated by enabling virtual backgrounds. Check with your Zoom host and agency staff about this option.

Appendix B: Frequently Asked Questions

Webinar vs. Meeting

What is the difference between a Zoom Webinar and a Zoom Meeting?
Your Zoom licensing limits active participants in a webinar and active participants in a meeting. To see a full comparison of features, visit the following Zoom resource: Meetings vs. Webinars.
To know your specific participant limits, consult your licensing agreement and level with Zoom.

Is use of a Zoom Webinar or Zoom Meeting format recommended?
For digital agency meetings, the Zoom Webinar format is recommended to allow for agency leaders to be designated as "panelists," which offers more control in participating in the meeting than those in the public audience who are designated as "participants." Participants can only participate in the webinar meeting when granted access by the Zoom host.

Can Zoom Webinars and Meetings both be recorded?
Yes, both webinars and meetings can be recorded in Zoom.

What is the purpose of recording a digital agency meeting?
Recording digital meetings is not required by law, but doing so can have some advantages. First, it can help in preparing minutes. It also can provide a way to further ensure meetings are more accessible for persons with disabilities, such as by allowing for more accurate closed-captioning. Since members of the public also can record meetings and post those recordings online, it can also provide an "official" version that can be referenced against edited or manipulated versions.

Zoom Webinar and Meeting Roles (Host, Co-host, Panelist, Attendee)

What is the difference between the role designations within a webinar or meeting?

- The host of the webinar is the user who schedules the webinar. He/She has full permissions to manage the webinar, panelists and attendees. There can only be one host of a webinar. The host can do things like stop and start the webinar, mute panelists' microphones, stop panelists' video, remove attendees from the webinar, and more.
- Co-hosts share many of the controls that hosts have, allowing the co-host to manage the administrative side of the webinar, such as managing attendees or starting/stopping the recording. The host must assign a co-host. Co-hosts cannot start a webinar. If a host needs someone else to be able to start the webinar, he/she can assign an alternative host.
- Panelists are full participants in a webinar. They can view and send video, share their screen, annotate, etc. Panelists must be assigned panelist permissions by the webinar host. The host can also disable some features for panelists, including starting video, sharing your screen and recording.
- Attendees are view-only participants whose microphones can be unmuted if the host chooses. Their view of the webinar is controlled by the host. They can interact with the host and the panelists through the Q&A and the chat.

Public Comments

How should public comment be handled during digital agency meetings?

Prior to receiving public comment, the chairperson of the meeting should verbally review the agency's rules regarding public comment during a digital meeting just as should happen in a normal, in-person agency meeting.

Can an individual indicate that he/she would like to submit a public comment?

Yes. Using the tools Zoom offers in both meeting and webinar formats, an individual should indicate a desire to submit a public comment. The Zoom host can acknowledge this individual, unmute his/her microphone, and begin timing the public comment. Use the Raise Hand feature, part of the Zoom Webinar features, for the public to be acknowledged for comment.

Does video functionality have to be used for public comment in digital agency meetings?

Video functionality may or may not be available for public comment depending on whether the Zoom Meeting or Zoom Webinar option was chosen for the digital agency meeting. The public should be made aware of this limitation prior to public comment. It is not believed to be a requirement of the Sunshine Act.

How does someone who calls in to a digital agency meeting indicate he/she would like to submit a public comment?

If the individual is not using the Zoom app and is only using phone audio, he/she may not have a way to indicate. This will have to be a local decision regarding whether the agency wants to facilitate a different route in this situation.

If questions are submitted to the host of a meeting, do ALL the questions that were submitted have to be addressed during the meeting to follow the Sunshine Laws?

Agencies are not legally obligated to respond to questions asked in the course of public comment. A statement from the chairperson that an appropriate staff person will respond to the question is sufficient.

Executive Session

Can agencies enter an executive session during a digital meeting? If so, how?

Agencies may pause a public meeting to commence an executive session at any time, so long as the reason is properly announced, just as with an in-person meeting. How the executive session is conducted will depend on the electronic meeting platform being used.

Can agencies use breakout rooms for executive session?
It is not yet clear whether the use of the "Breakout Room" function of Zoom or similar features of other platforms is sufficiently secure to ensure the confidentiality of executive discussions. It is recommended that a separate Zoom Meeting, which only agency members and other needed participants can access be used for this purpose.

How should agencies address the confidentiality of executive session in a digital environment? For example, how do we know that an agency board member doesn't have someone listening in at his/her remote location?
This concern should not stop an agency from holding a virtual executive session when necessary, absent particular security concerns. There is no effective way to ensure that when someone is participating electronically in a meeting there is not someone at the remote location also listening in, just as there is no way to ensure that an agency board member attending a normal executive session in person does not divulge what was discussed to others. It is recommended that each participant be asked whether anyone else is able to hear the discussion, but beyond that, there is little else that can be done. Also, it should be taken into account that virtual meetings are subject to the same internet security vulnerabilities as any other online activity.

Appendix C:
Guide for Secure and Effective Zoom Settings
for Agency Meetings

Appendix C

#1 TIP

Use Zoom Webinar instead of Zoom Meeting for your digital agency meeting.

- ❑ Require registration to Zoom Webinar and enable auto-approve for registrants.
- ❑ Designate agency staff and leadership as panelists in Zoom Webinar.
- ❑ Encourage all panelists to create a personal Zoom account for easier authentication.
- ❑ If using video and if devices permit, select a virtual background for panelists.
- ❑ Assign alternate hosts in case of technical difficulties.
- ❑ Turn screen-sharing options to "host only."
- ❑ Set Q&A to be viewed only by the host/co-host.
- ❑ Use Raise Hand feature to facilitate public comment.
- ❑ Approve both telephone and computer audio.
- ❑ Set all microphones to be muted upon entry.
- ❑ Enable livestream to allow for more participants than limitation of license.
- ❑ Disable comments on livestream platform.

Tips for **SECURE** and Effective
Digital Agency Meetings on

zoom

If using Zoom Meetings, the following additional settings will enhance security and promote effective meetings:

- ❑ Set all microphones to mute and all video off upon entry.
- ❑ Disable "Join Before Host" and enable "Waiting Room."
- ❑ Disable "File Transfer."
- ❑ Disable "Allow Removed Participants to Rejoin."
- ❑ Set chat to be viewable only by host.
- ❑ Do not share any meeting links publicly; require password and/or registration to join. (Registration link should be shared publicly for agency meeting)

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Appendix D:
One-Page Overview of Transitioning to Zoom
for Agency Meetings

Step 1: Assess
- ❑ Assess your team and designate someone to be the Zoom host.
- ❑ Assess your technology for microphone, video and internet speed capabilities.
- ❑ Assess your timeline for public notice, device distribution and/or training, and accessibility accommodations.

Step 2: Plan
- ❑ Understand the difference between Zoom Webinar and Zoom Meeting.
- ❑ Schedule Zoom Meeting and advertise registration link along with livestream information.
- ❑ Adjust settings to ensure secure and effective meetings.
- ❑ Educate public and agency board on how public comment will be facilitated in the digital meeting.

Step 3: Test
- ❑ Hold one-on-one tests for each member of the agency board and agency staff who have a need to know.
- ❑ Hold a practice webinar for agency board members to join prior to public meeting, emphasize to all participants that discussion will be limited to testing platform and technology.
- ❑ Ensure digital materials are saved locally to Zoom host device and one alternative host device.

Step 4: Launch
- ❑ Set expectations and review public comment policy during welcome remarks.
- ❑ Announce that test was conducted and the agency meeting will be recorded (if applicable, and livestreamed).
- ❑ Share agenda with image of a flag to conduct pledge.
- ❑ Roll call, voting and motions should all proceed with agency board members identifying themselves by stating full name.
- ❑ Hold public comment by using Raise Hands feature in Zoom Webinar to be acknowledged by Zoom host and have microphone unmuted to submit comment to the board.

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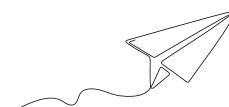
Appendix E

Appendix E:
One-Page Tips for Secure & Effective
Digital Executive Sessions

Tips for SECURE & EFFECTIVE
Digital Executive Sessions on zoom

When using Zoom Meetings for executive sessions it is recommended that Zoom hosts encourage (or require) all participants to create a personal Zoom account for authentication. For Zoom hosts, this Zoom tutorial could be helpful. For determining a participant's internet capacity, use FCC's guide for broadband speeds and speedtest.net prior to Zoom webinars or meetings.

Setting up Zoom Executive Session Meeting
In "General Settings," ensure the following:
- ❑ Always show meeting control toolbar is on.
- ❑ Enable remote support.
- ❑ Enable virtual backgrounds ("In Meeting, Advanced").
- ❑ Enable "co-host."
- ❑ Disable file transfer. For privacy and security, documents relevant to the meeting should be sent via district email, shared cloud drives (like Google Docs or OneDrive).
- ❑ If using screensharing, set to "host only" and ensure "Show Zoom windows during screenshare" is on.
- ❑ If using the chat box, disable private chat.

When scheduling the meeting, set the following:
- ❑ Video for host and participants is "on"
- ❑ Approve both telephone and computer audio
- ❑ All microphones to be muted upon entry
- ❑ Disable "Join Before Host"
- ❑ Enable "Waiting Room"

Starting Zoom Executive Session Meeting
- ❑ Zoom host begins meeting and opens participant panel and chat box (bottom toolbar).
- ❑ Once all who are expected have joined, Zoom host should click "Security" in bottom tool bar and lock the meeting to secure it. If more people are anticipated to join, click "Enable waiting room" instead of "lock meeting" to allow for the Zoom host to manually accept late participants.
- ❑ Note: Executive session participants should have a contact number of the Zoom host to mitigate any technical difficulties entering or participating in the meeting.
- ❑ Zoom host can elevate any participant to co-host by scrolling over name in the participants window and using drop-down menu to choose co-host option or even turn over hosting to another participant. Zoom host can always reclaim hosting.
- ❑ Zoom host should allow videos to be turned off if participant is working with limited cellular data or slower internet connections.

Additional Zoom Security Measures
- ❑ When scheduling meetings, consider selecting "Only authenticated users can join." This will require all participants of the executive session to log into a personal Zoom account before clicking the link to join the meeting and provides additional security. However, if this is a barrier for those who need to join the executive session meeting, do not select this option.
- ❑ When scheduling meetings, consider requiring a password to be entered in addition to the Zoom link, for added security. This password will be provided within the meeting invitation, but you should alert meeting participants to this extra step prior to the meeting.

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Additional Zoom Features
- ❑ Zoom host could enable nonverbal feedback and other collaborative tools (annotate, whiteboard) if the board would find a use for them during the executive session. These are found in general settings under "In Meeting (basic)."

Appendix F:
One-Page Tips Agency Leaders
Joining Digital Meetings

zoom

Assess your space.

Where you join can have an impact on the quality of your experience. Lighting, sound and internet connectivity are all important to others being able to see and hear you. Consider the following:

- ☐ Choose a quiet location, preferably where you can close a door.
- ☐ Plug in device and ensure it can stay connected to power throughout the meeting/webinar.
- ☐ Place device on a flat, steady surface about eye-level, 1-2 feet from the camera.
- ☐ Sit with a wall or cabinet directly behind you for a neutral background.
- ☐ Avoid reflective backgrounds (windows, TVs, mirrors, etc.).
- ☐ Test different lighting options so that your face is illuminated and the light isn't coming from directly behind you.
- ☐ Test your internet connectivity to ensure it is strong enough for clear audio and, if using, video streaming.
- ☐ Silence or remove any electronics in your location that could disrupt during the meeting.

Test your technology.

You can join digital meetings from your phone, laptop or tablet. Each device should have integrated microphone and speakers, but consider using headphones if you have them.

- ☐ Test your sound (if using, headphones).
- ☐ Test your microphone (on device or external).
- ☐ Familiarize yourself with the platform by creating a free account and exploring supporting documents and tutorials.
- ☐ In Zoom, you can create a profile picture, select virtual background and run a test meeting.
- ☐ Send any questions or issues to the designated district staff supporting digital meetings.

Join the meeting.

Meeting etiquette is important, and participants should consider how to familiarize themselves with the platform, features and options. Just as in a physical meeting, your attention, body language and tone are important.

- ☐ Join the meeting early to ensure no glitches and test equipment again.
- ☐ Mute your microphone unless you are speaking.
- ☐ Be aware of your eye contact and attention.
- ☐ Do not multitask during the meeting — stay focused on the agenda and discussion.
- ☐ If your video is off, identify yourself when making a motion or submitting a vote: "This is Audrey."
- ☐ Follow guidance from your agency leadership, agency support staff and agency administration regarding local procedures including public comment.

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