American Scientific Affiliation

Chapter Zoom Guide

September 2020

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Table of Contents

The American Scientific Affiliation supports the use of online technology to offer programs and services. The intent is to expand the reach of the ASA mission to a broader audience and provide for convenience in interacting with ASA members and the public remotely. Delivery of events online through either Zoom meetings or webinars will enhance our engagement. This document is designed to guide ASA leaders especially from ASA chapters in using the Zoom tool to extend the reach of the ASA into communities of faith and serve Christians in all fields of science.

1. ZOOM TECHNOLOGY

1.1 INTRODUCTION

The American Scientific Affiliation (ASA) is offering support to online events using Zoom as a video conference application. Several criteria were reviewed to determine that Zoom is the best platform in the marketplace, such as the ability to reach a mass audience, the ease of use, no software requirements, and no zoom account is needed for participants. Features include multiple presenters in either gallery or speaker view and the ability to record the events. There is also a chat box and live Q&A, all for an affordable price.

1.2 SUPPORT CAPABILITY

Zoom provides for the ability to convene either an online meeting or a webinar. Event planners will need to decide which option makes the most sense based on objective and the audience. Figure 1 offers a side by side view of these alternative formats. Further information can be found as questions and answers presented in Zoom Resources (Section 1.3) that will assist in determining which Zoom option to use. Contact the ASA home office if additional guidance is needed.

Zoom Meetings	Zoom Webinars
➢ Includes up to 500 interactive participants	➢ Up to 500 interactive video participants and additional view-only attendees
	➢ Attendees join and can "chat" and participate in on-screen "Q&A" but not audio or video
➢ Meeting duration can be up 24 hours	➢ Livestream to unlimited audience on social media
➢ At meeting set-up can require registration and/or password to join	➢ At meeting set-up can require attendees to register (optional)
➢ At meeting set-up can require host to "admit" participants before they join the meeting	
➢ Host can mute/unmute participants	➢ Host can mute/unmute participants
➢ Participants can share their screens	➢ Participants can share their screens
➢ Participants can be sent into "break-out" rooms for small group discussion	➢ Q&A can be answered live or via text answers
➢ Online collaboration/whiteboard	➢ Online polling, registration and reporting capabilities
➢ Participants can "raise their hand" in the chat window if they have a question	
➢ Meetings can be recorded	➢ Meetings can be recorded

Figure 1: Comparison of Zoom Meetings and Zoom Webinars according to audience and features.

1.3   ZOOM RESOURCES

The following set of questions and answers can assist in concluding which Zoom tool to use:

Q. When would I use Zoom webinars instead of Zoom meetings?

A. If you have multiple presenters and you want your audience to only see/hear the presenters, not the other participants, then you may want to consider Zoom webinars.

Q. I want to have an interactive meeting and include small group discussions, which platform would I use?

A. You would use Zoom meetings. Have a Zoom meeting and then consider utilizing breakout rooms of a defined size/timeframe for small group discussions.

Q. I don't have a Zoom account, can I still schedule a meeting for a chapter event?

A. Yes, the ASA has a Zoom account and can schedule a meeting for you. Follow our process document to schedule your meeting. Our team will work with you to ensure you get the meeting links and that the meeting starts online when scheduled.

Q. We have a great speaker lined up and would like to hold a joint meeting with another chapter, which platform would be best?

A. The Zoom webinar platform would likely be best so that the speaker can be seen and heard across multiple locations without the attendees being on audio or video and yet the attendees would still be able to submit questions and interact via the chat functionality.

Q. If I chose to schedule a Zoom meeting or webinar, is there any support available?

A. Yes, the ASA staff is available to help you prepare for and conduct your meetings from both a logistical and technical perspective. There is also supporting documentation (below) to guide you to a successful meeting.

Additionally, the Zoom corporate page has a wide range of informational resources available on their website.

For more information about Zoom meeting functionality, see the Zoom meetings webpage.

For more information about Zoom webinar functionality, see the Zoom webinar webpage.

Tips for Effective Zoom Videoconferencing
Plan early and thoroughly
Recruit strong talent for hosting
Strategically decide on features
Ask ASA staff for help as needed
Design script and a run sheet
Be aware and flexible throughout
Share details on how to join
Give good instruction to speakers
Conduct a practice run
Watch for hackers or distractions
Ask for feedback from attendees
Debrief to evaluate with team
Post recording on website

1.4   ZOOM BEST PRACTICES

The following is a list of best practices for meeting hosts and participants to adopt for a successful online Zoom event:

Privacy Best Practices for Zoom Meetings
- Enable waiting room – this requires the meeting organizer to admit participants and ensures that unwanted or unknown participants do not enter the meeting.
- To minimize hackers or disrupters, do not share login information publicly and use password function and/or waiting room to ensure invited guests only.
- Registration is encouraged to facilitate private sharing of login information. Home office can assist in setting up a registration for the meeting per notation on Zoom Meeting Request Form (page11).
- Inform the Meeting Host or Executive Producer if breakout rooms will be needed.
- Disable private chat – this prevents anyone from unwanted messages during the meeting. It also means participants cannot privately chat amongst themselves so depending on the type of meeting you may want to leave this on or disable it.
- Manage screen sharing – This prevents screen sharing without the host's permission.
- Be cautious where you share the meeting ID. Keep it private to prevent unwanted attendees.
- During the chat, click on "Participants" and "Chat" to monitor who is in the meeting and the messages in the chat. You can also mute all participants during the chat or before they enter.
- Click "end meeting" to terminate the meeting. This is an important step for added security to close out the meeting at the end to prevent others from staying on.

Technical Best Practices for Zoom Meetings and Webinars
- Sound – For best sound quality, speakers should wear headphones and microphones.
- Rehearse it first – For Zoom webinars, schedule a rehearsal so all speakers can practice transitions including sequencing, screen shares, video on/off, mute on/off, and sound volume.
- Virtual Backgrounds – If using backgrounds, prepare ahead of time and ensure they are not distracting and that the colors work on video.
- Designate who will help during the meeting. For example, someone to continue to admit participants that arrive late, gather questions being submitted over chat or Q&A to be answered by the presenter at the end, or mute participants who may forget to mute themselves so as to not distract the speaker. Refer to Section 2.1 – Production Team.
- Consider a Zoom training for Production Team members that are less familiar with tool.
- Offer speaker bios, resources, links to references mentioned in talk, etc. in chat window.
- Add session titles in chat feed to indicate breaks between speakers.
- Decide if the chat function will be saved as text file, shared in the meeting, visible to everyone or privately, or shut off completely (switches to each are found in the meeting controls).
- Discuss and prepare for breakout sessions (Meetings only) as requested by organizers.
- Use co-host instead of host function with panelists.

Participant Best Practices
- Find a quiet location to join the meeting and make sure you have a good wi-fi signal.
- Login using your first and last name.
- Join a meeting a few minutes early to test your audio and video connections.
- Use a headset or earbuds instead of speakers and a microphone. The connection may sound fine to you but speakers and a microphone can generate too much static for others.
- Mute your audio unless you are speaking so as to prevent unintentional background noise from disrupting the conversation.
- When video is enabled, speak to the camera, not to the screen, so people can see your face.

- Check your background, put away anything you may not want anyone to see and/or notice any glaring lights that may be a problem behind you.

2.   STEP-BY-STEP GUIDELINES

ASA will provide staff support as needed to local and group events for using Zoom videoconferencing. The following guidance will assist in planning, executing, and evaluating remotely held presentations on Zoom to ASA members and the public.

2.1   BEFORE THE EVENT

The following step-by-step guide should be followed prior to the Zoom meeting or Zoom webinar:

1. Determine the type of Zoom gathering required, as a meeting or webinar (see Section 1.2).
2. Contact Becky English (*becky@asa3.org*) to request assistance using the Zoom Request Form (Appendix A) to provide the following information:
    a. Meeting or webinar
    b. ASA chapter or group
    c. Title and description or abstract
    d. Date and time
    e. Presenters
    f. Estimated number of participants
    g. Key contact person(s)
3. Decide if registration is required and prepare accordingly.
4. Becky will schedule the meeting and post it on the ASA calendars.
5. Share Zoom login information with hosts, presenters, and audience as appropriate.
6. Craft an agenda, script, and run sheet which is a play-by-play task list and by whom for the event (see example in Appendix B).*
7. Recruit taskmasters for the Production Team (see Section 2.1 – Production Team)*:
    a. Assistant from ASA Home office
    b. Executive Producer – the key decision-maker and lead for the event
    c. Tech Guru
    d. Master of Ceremony / Host
    e. Q&A Guide – the person posting questions as "Answered live by the speaker"
    f. Chat Moderator – the person monitoring issues coming from the audience
8. Decide on logistics and prepare the Production Team (PT)*
    a. How will the audience participate – by video, chat, Q&A?
    b. Modify meeting check-off list according to event needs
    c. Prepare a speaker packet – welcome, tech/virtual tips, values, forum agenda, list of pre-selected questions, zoom best practices (backgrounds, microphones, etc.)
    d. Design Opening and Closing static screenshots and any needed "Announcements" page
    e. Review tech/virtual tips with PT
    f. Plan for possible trolls and hackers, the infamous "Zoom Bombers" coming in uninvited
9. Conduct a dry-run rehearsal with all taskmasters, including on/off muting, screen sharing, transition que comments, slide set deck advances, and debriefs.
10. Check background lighting and sound for each panelist.
11. Determine how and who will use the ASA Introduction Slide Deck at opening of event and modify the information as needed. A copy of the Powerpoint file is available on the ASA webpage.

*This step may be modified according to specific needs as either a Zoom Meeting or Zoom Webinar.

2.2   PRODUCTION TEAM FOR ZOOM MEETING

ASA encourages the recruitment of volunteers to perform various tasks as part of the production procedure, collectively called the Production Team. See below for key roles and responsibilities to consider for a Zoom meeting (See Section 1.2 – Support Capability).

Production Team and Responsibilities

ASA Assistant (home office staff)
> One staff member from the home office will be assigned to serve as the liaison between ASA Office and the event:
> - Check calendar for conflicts, evaluate internal capability, and advise event organizers if alternative date is needed.
> - Prepare for Zoom space by initiating upgrade to license as needed, scheduling the meeting time, sharing the links where appropriate, and offering instruction (run sheet, production timeline, etc.) to Production Team members according to responsible tasks.
> - Attend practice sessions and live event to monitor the proceedings.
> - Assist with breakout rooms, as needed.

Moderator / Host (chapter/group representative)
> Manages the dialog during the event:
> - Welcome the audience and offers housekeeping instructions (i.e., Q&A procedure, chat function, pop-up invitation if they get dropped and need to rejoin, mute/unmute, gallery versus speaker view, raise hand, etc.)
> - Introduce the presenters.
> - Receive questions from Q&A Guide and filter them to proper speaker.
> - Conclude the event with a final thank you and information related to recording, future events, audience feedback/survey, etc.
> - Collect questions from audience by monitoring the Q&A dialog box or by email.
> - Group questions according to topic and prioritize them.
> - Choose which questions to put forward to presenters and share with MC.
> - Prepare a list of questions to supplement audience inquiries, if needed.
> - Answer any basic questions related to event, not presenter content, as appropriate.
> - Remove anyone who is being disruptive.
> - Post bios on the presenters.
> - Offer links to resources such as websites, books, articles, etc. that presenters may mention during their talk.
> - Respond as appropriate to general dialog and forward questions to Q&A Guide.
> - Monitor for trolls and remove disrupters from Participants menu.

2.3   PRODUCTION TEAM FOR ZOOM WEBINAR

See below for key roles and responsibilities to consider for a Zoom webinar. One person can potentially serve in more than one role depending on the size of the anticipated audience and type of event being planned. ASA staff can offer additional suggestions upon request.

Production Team and Responsibilities

ASA Assistant (home office staff)
> One staff member from the home office will be assigned to serve as the liaison between the ASA and the event:

- Check calendar for conflicts, evaluate internal capacity, and advise event organizers if alternative date is needed.
- Prepare for Zoom space by initiating upgrade to license as needed, scheduling the meeting time, sharing the links where appropriate, and offering instruction (run sheet, production timeline, etc.) to Production Team members according to responsible tasks.
- Attend practice sessions and live event to monitor the proceedings.

Executive Producer (chapter/group contact or home office staff)

Provide oversight to the entire production:
- Create the run sheet (play-by-play script), divide up teams as needed, assign roles within the Production Team, and schedule the practice session.
- Prepare a speaker packet with welcome, tech/virtual tips, event agenda, list of pre-selected questions, run sheet, and Zoom best practices.
- Select theme music for pre-meeting "waiting" and "concluding" rooms
- Monitor the proceedings using two screens to see audience view and presenter view, look for trouble in technology to send to Tech Guru, and manage dynamic engagement between presenters and audience.

ASA Tech Guru (home office staff)

Manage Zoom technology in real time and serve as host within Zoom:
- Coach presenters on best lighting, sound, etc. and share Zoom best practices.
- Run the audiovisual equipment such as switching screens between presenters and Master of Ceremony, muting/unmuting participants, turning hosts on/off, broadcasting, and recording.
- Consider using two screens, if possible, to monitor as a host and as a participant.
- Two screens may also be helpful in viewing the run sheet and the meeting, simultaneously.
- Record in speaker view rather than gallery view so images of panelists are larger.
- Troubleshoot technology glitches and handle interruptions from hackers or registered guests.
- Take screenshot of event for use in promotional materials and on the website.

Moderator / Host (chapter/group representative)

Manages the dialog during the event:
- Welcome the audience and offers housekeeping instructions.
- Introduce the presenters.
- Receive questions from Q&A Guide and filter them to proper speaker.
- Conclude the event with a final thank you and information related to recording, future events, audience feedback/survey, etc.

Q&A Guide (chapter/group representative)

Assists with the Q&A
- Collect questions from audience by monitoring the Q&A dialog box or by email.
- Group questions according to topic and prioritize them.
- Choose which questions to put forward to presenters and share with MC.
- Prepare a list of questions to supplement audience inquiries, if needed.
- Answer any basic questions related to event, not presenter content, as appropriate.
- Remove anyone who is being disruptive.

Chat Moderator (chapter/group representative)

Monitors the chat box.
- Post bios on the presenters.
- Offer links to resources such as websites, books, articles, etc. that presenters may mention during their talk.
- Respond as appropriate to general dialog and forward questions to Q&A Guide.
- Remove anyone who is being disruptive.

2.4   DURING THE EVENT

The following step-by-step guide should be followed during the Zoom meeting or Zoom webinar:

1. Proceed through the meeting/webinar run sheet.
2. Executive Producer manages team members, traffic, and activity using meeting check-off list.*
3. Tech Guru gives oversight on tech dashboard, records event, and takes screenshot images.*
4. MC / Host offers opening and closing remarks, and monitors transition between speakers.
5. Assistant from ASA Office participates in the audience to offer real-time feedback.*
6. Tech Guru or ASA Assistant can manage participants by using authentication code, a waiting room, disable private chats, put guests on hold, or remove unwanted and disruptive participants.
7. Q&A Guide gathers questions (in zoom or by email) and feeds them to presenters as needed.
8. Chat Moderator responds to comments and keeps watch for trolls and hackers.
9. MC / Host asks for audience feedback.

    *Please note – Steps needed for webinars only.

2.5   AFTER THE EVENT

The following should be conducted at the conclusion of the Zoom event:

1. Convene a short debrief meeting at the close with guidance from the ASA Assistant.
2. Gather feedback from participants as informal questions during the event or as a formal survey.
3. Review analytics and audience feedback
4. Archive recording and screenshots.
5. Tech Guru or Moderator / Host will clean up the recording and post on website.
6. Survey the Production Team for lessons learned and improvement ideas.
7. Send images to Dana Oleskiewicz (*dana@asa3.org*) to post on social media and archive.
8. If registration was not done through Zoom or the home office, send the attendee list to Dana.

APPENDICES

A.   ZOOM REQUEST FORM

B.   EVENT SCRIPT AND ZOOM RUN SHEET

APPENDIX A

**American Scientific Affiliation
Zoom Meeting Request Form**

This form can be used to request assistance from the home office to utilize the ASA Zoom license. Please provide the information below and forward this form to Becky@asa3.org.

Will you need an online meeting or a Zoom webinar (please circle)? Meeting Webinar

ASA Chapter or Group:

Contact Name:

Email and Phone Number:

Date / Time of the Event:

Event Title:

Presenters:

Abstract or topic:

Estimated number of Participants:

Special Instructions (i.e. registration required, password requested, etc.):

V1.1 (9/20)

APPENDIX B

American Scientific Affiliation
Event Script and Zoom Run Sheet – Example

A script and run sheet provide guidance on what will be said during the presentation and by whom, along with the anticipated time stamp for each aspect of the program. It also includes technology tasks to be performed by the Production Team as the event proceeds.

Example 1 below can be adopted or create something similar that suites the purpose of the videoconference being planned. The ASA home office can provide additional ideas in developing a script and run sheet.

Example 2 is created in Google Sheets which allows for real time changes by multiple people sharing the file during the hosting of an event.

EXAMPLE 1
Script for May 8, 2020
CSCA presentation by Isaiah Ritzmann

Time	Action for Zoom Meeting
6:40 p.m.	Mark (**Executive Producer / Tech Guru**) and David (**Master of Ceremony**) check in to webinar and rehearse details (Mark will send out links to panelists and attendees)
6:50 p.m.	• Isaiah checks into webinar; last minute questions and rehearsal and prayer • **Uncheck "raise hand" ✓** • **Check "Mute participants on entry" [participants = panelists] ✓** • **Set "Follow Host's View" ✓** • **Check "Allow panelists to start video" ✓** • **Check "Allow panelists to share their screen" ✓** • **Start Recording** • **Mute everyone** • **Turn off Mark's audio & video** • **Start CSCA intro slide show** • **Share Mark's PPT screen** • **PRESS BROADCAST**
7:00 p.m.	Webinar goes live CSCA Logo is showing David turns on video/audio

Switch to David's video

[Advance the slide in the background]

David gives his introduction, format, and introduces Isaiah (**Presenter**)
(CSCA slide towards end of my spiel). Isaiah's PowerPoint title slide comes on as I introduce Isaiah.

Welcome to tonight's presentation hosted by the Waterloo chapter of the Canadian Scientific and Christian Affiliation. My name is David Shumaker, and we are pleased to have Isaiah Ritzmann as our guest tonight. First, thanks for choosing us over Netflix. We're glad that you're part of this conversation.

Second, and more importantly, I hope you are well, and that you are finding creative ways during this time to build community and support those who are most vulnerable around you.

For those who may be new to the CSCA we are a network of Christians working in the sciences or who are interested in science. In Canada, we are 11 chapters across the country, and we work closely with our American cousins the American Scientific Affiliation to host an annual academic conference, and publish a peer-reviewed academic journal, and an online magazine featuring essays, stories, poetry and artwork.

If you are interested, please join us. On your screen you'll see ways to be in touch. I'll give you a chance to take in the information. [Pause--**Switch to Mark's screen share**] Sign up on our email list, follow us on your favorite social media platform, come out to events, or even become a member, and you will receive both publications and discounts at the annual conference. Student membership is free. Those who pay help to subsidize those student memberships. **Switch to David's video**

Some housekeeping notes: Isaiah will give his presentation followed by a time for questions. You can join in the conversation in one of two ways. You'll notice that there are two buttons on the bottom of your screen. One is called Q&A. Questions you leave won't be visible to the audience. I will read them some of the questions out loud. If you would like your name mentioned as I read the question, begin the question with your name: "Hi, this is David from Kitchener, and my question is…" Otherwise, leave your name off, and I won't read it.

The other way to be involved is with the chat. If you type something there, your screen name will be made public to the group. This is a chance to show your support for Isaiah or make your presence known to your colleagues.
You have the option to send your message to only the panelists or to all attendees and panelists. As with any event, we ask you to be respectful and charitable.

	At the end of the Q&A, I'll end the meeting, all video and audio will be turned off, but we'll keep the webinar open for another 15 minutes if you want to leave final questions or comments for Isaiah. **[Isaiah must be sharing video & audio at this point]** **Switch to Gallery View** **Isaiah Ritzmann** has worked for the past five years as a community educator with The Working Centre, a not-for-profit that builds community and resilience in downtown Kitchener, ON. He has facilitated classes, book clubs, and speaker series on community, economic, and ecological issues. He graduated in 2015 with a Master of Theological Studies from the University of Waterloo and is keenly interested in the intersection between faith, community, and technology. He lives in Kitchener. **[Isaiah starts screen sharing his presentation]** Isaiah's presentation is called: Technology: Progress or Prudence? **Switch to Isaiah's Screen only.** **[David's video & audio are off.]**
7:10 p.m.	Isaiah begins presentation
7:50 p.m.	Isaiah ends presentation
7:50 p.m.	Q&A session Remind of Q&A format **[David turns ON his video & audio.]** **Switch to Gallery view** David reads questions for Isaiah. Isaiah's response and then next question.
8:30 p.m.	David ends formal session and invites into "networking" time over chat. **[David's video & audio are off.]** **[Isaiah's video & audio are off.]** **Mark shares CSCA info slide.** Audience can send Isaiah a note of encouragement, a question or comment, or a request to connect.
8:45 p.m.	Networking time concludes.

EXAMPLE 2
Run Sheet for July 26, 2020
Worship Service
ASA Summer Something Series

ASA Summer Something Series
Worship Service via Zoom Webinar
Sunday, July 26, 2020
12 pm – 1 pm EDT

	A	B	C	D	E	F	G	H	I / J	K	L
3				Zoom Event Type:	Webinar						
4				Public (Attendee) Event Link:	https://us02web.zoom.us/j				Backup folder: https://drive.		

	Tech	Item	Type	Speaker	Sharing	Share Content	Min	Start	End	Notes
7	☑	**1 Technical team Joins**					30	11:15 AM	11:45 AM	
8		Setup:								
9	☑		Make Mark the Host							
10	☑ Mark	Ensure Becky is Cohost								
11	☐ Mark	Log in on tablet as participant								
12	☑ Mark	Pop Out Chat & Participant Panels								
13	☑ Mark	Turn off raise hand								
14	☑ Mark	Enable "mute upon entry"								
15	☑ Mark	Allow Panelists to start video								
16	☑ Mark	Force "Active Speaker View" to viewers								
17	☑ Mark	Test screen share of all content. Others confirm they can see/hear.								
18	☑ Mark	Attempt Volume normalize across all videos (ask for feedback)								
19	☑ Mark	Open Full screen of initial content & cue								
20	☐	Confirm no changes from runsheet below								
22		Each speaker confirms they they know...								
23	☐	When they come in (look at **Speaker** column in runsheet below)								
24	☑	That Mark is starting/stopping video, but that they have the power if necessary								
25	☑	That Mark is muting/unmuting, but that they have the power if necessary								
26	☐	They know that they will appear & be unmuted just as the previous content/speaking is ending; the target is 100% seamless transition.								
27	☐	They may remain visible & unmuted for a moment while the next content/speaker starts.								
28	☐	They should not try to speak during a screen share (except for Vicki with the ECHO slide).								
29	☐	They know who is coming after them. Ideally, they can mention it as a cue to Mark, and to the next speaker.								
30		e.g. "And with that I'll finish. Next is ___. ... [filler talk]"								
31		(Abruptly ending without warning threatens to create dead space while Mark scrambles—or worse, to leave the next speaker unaware they are about								
32	☑	That **the end of the Webinar does not become private again.** If you unhide / unmute yourself, it's public to all viewers.								
34		Practice it:								
35	☑ Mark	All Panelists must stop video								(Otherwise
36	☑ Mark	Mute everyone; Allow self-unmute, self-video start(?)								
37	☑ Mark	Practice (un)showing & (un)muting each speaker. Take note of (and fix?) speakers who need to be "asked"; inform them to watch for that anyway.								
38	☑ Mark	Cue screen share for single-click.								
39	☐ Mark	Discussion (if necessary)								
41		Prepare Broadcast:						11:43 AM		
42	☑ Mark	Stop & Cover own video								
43	☑ Mark	All Panelists must stop video								(Otherwise