



VIRTUAL EVENTS GUIDE

Updated August 2020

OVERVIEW OF VIRTUAL EVENT PLATFORMS AND BEST PRACTICE

- Virtual Event Platforms
 - Zoom Meeting
 - Zoom Webinar
 - UW Video Services
- Event Restrictions and Guidance
- Accessibility

ZOOM USER GUIDES

- Zoom Guide for Organizers
- Zoom Guide for Facilitators (internal and external)
- Zoom Guide for Participants

OVERVIEW OF VIRTUAL EVENT PLATFORMS AND BEST PRACTICES

VIRTUAL EVENT PLATFORMS

Zoom Meeting: All UW staff have access to Zoom Pro and can run a Zoom meeting with no additional cost or product needed.

Getting Started: Visit <https://washington.zoom.us/> to sign into your Zoom Pro account.

If you are running a meeting or a presentation with 300 people or less, Zoom Pro is a great option [and free to current UW faculty, staff and students](#). Zoom Pro is customizable so you can limit audience participation in Zoom settings, mimicking many of the features of Zoom Webinar (see below).

Zoom Webinar: Zoom Webinar is useful when you want to give a presentation to a large audience with limited participation. Attendees are view-only participants. Panelists can share audio, video and screen. You can also accomplish many of the Zoom Webinar features with Zoom Pro (such as muting all participants, restricting chat, etc.) as outlined in the Zoom for Facilitators document.

Getting started: More information about Zoom add-ons can be found [here](#). Connect with Mark Haslam (haslam@uw.edu) to arrange add-ons for Zoom. Zoom Webinar add-ons can only be assigned to a UW NetID, not a shared NetID.

Zoom Add-ons	Description	Price per year
Webinar 100	Host online panelist events with up to 100 attendees	\$350
Webinar 500	Host online panelist events with up to 500 attendees	\$1,215
Webinar 1000	Host online panelist events with up to 1000 attendees	\$2,955
Webinar 3000, 5000, 10000	Host online panelist events with up to 3000, 5000, or 10000 attendees	Contact: help@uw.edu

Zoom Webinar is the most streamlined way to host an event that mimics a lecture with limited audience participation.

UW Video: UW Video will work with you to pick the best option to record and/or live stream your event to as few or as many individuals as you would like. UW Video can also include high quality graphics and branding in the presentation. If you would like to have someone else handle most of the technical aspects of the program or know that you want to use YouTube Livestream features, UW Video is the best option.

Getting started: Contact information, examples and project descriptions can be found here:

<https://www.washington.edu/video/our-services/examples-of-our-work/>

Cost: A UW Video live stream can cost anywhere from \$1,200-\$4,000 and takes some time to set up. Since UW Video is experiencing increased demand for virtual events as a result of COVID-19, it is best to reach out as soon as you have a date in mind.



Please consult with Monique Thormann (thormm@uw.edu) for **branding guidance and video questions**.

EVENT RESTRICTIONS AND GUIDANCE

Restrictions on events are based on the current phase the campus is in under the Safe Start plan. Learn more about the status for the Seattle campus and what events are allowed in each phase on [the Safe Start status page](#).

Phase 1, In-person social events and gatherings: Not permitted.

Phase 2 (Seattle campus, as of August 1), In-person social events and gatherings: If necessary and with no more than 5 people. Hold remote when possible.

Phase 3, In-person social events and gatherings: If necessary and with no more than 50 people. Hold remote when possible.

Phase 4, In-person social events and gatherings: If necessary – more than 50 people are permitted. Hold remote when possible.

The current guidance has led some departments on campus to suspend all in-person gatherings through at least Halloween. In general, in-person events are discouraged. Hybrid events (a mix of in-person and virtual attendees) may be possible during Phases 3 and 4. Please reach out to Monique Thormann (thormm@uw.edu) or Sarah Greenberg (sargreen@uw.edu) for consultation or examples.

ACCESSIBILITY

Virtual events should be delivered in a way that ensures that all members of the audience can access the content. This includes delivering the content in an accessible media platform and adding captions, transcripts and audio descriptions. UW has developed a guide for creating accessible videos for all of the platforms listed in this guide. See this site for details and options:

<https://www.washington.edu/accessibility/videos/>



ZOOM GUIDE FOR EVENT ORGANIZERS

BEFORE THE EVENT:

- Set up participant sharing settings: Enable the chat feature in the general settings for your Zoom account.
- Schedule the meeting: Select schedule a meeting at the top of the screen
- Opt for the following settings as you create your event:
 - Require meeting password if your link is being shared broadly
 - Only share password with people who register for the event
 - Mute all participants upon entry
 - Recommended if this is an event and not a meeting
 - Add a cohost
 - You can only add other UW email addresses as a cohost before the event
 - If you have an external speaker, on the day of the event, have them arrive to the event early and add them as a cohost
 - The external speaker will not be able to mute and unmute themselves.
 - If it is going to be loud where they are, please have them mute, but raise their hand prior to wanting to speak, so host can unmute them.
 - Enable waiting room
 - This will allow your hosts to enter the meeting ahead of time and then you can accept all of your guests when the event starts
 - Breakout rooms
 - Must be preset ahead of time or the host can assign/move participants between rooms during the meeting. Participants cannot choose their own rooms or move on their own.
 - Polling
 - At the bottom of the scheduled meeting, there is an option to create a poll to launch during the event. Polls can be a useful way to gather feedback and engage the audience during the meeting. You will be able to launch the poll during your meeting, gather responses, and share out the results. You also have the ability to download a report of polling after the meeting. When creating the poll, you have the option to check a box to conduct the poll anonymously. More polling information can be found [here](#).
 - Recording
 - Under 'Meeting Options' select "record meeting automatically" if you would like your meeting recorded. Participants will get a notification at the beginning of the program to consent to the recording. If you do not select this option before the meeting, you can record the meeting after it has started by selecting the record button at the bottom of the screen.
- Registration: There is an option to select [Zoom registration](#). If you select this, participants can register through Zoom for the program and will get an email with the Zoom link. As the event organizer, you can customize the registration process:



- If you would like to approve everyone who signs up before Zoom sends the event link, select “manually approve.” Otherwise, “automatically approve” will streamline the process for you.
- Custom Questions: You can add custom questions to learn more about your audience prior to the event.

EVENT DAY:

Arrive 20 minutes early to your event and do the following within the meeting:

- Allow guests to rename themselves by selecting this option in Security settings
- Monitor the Waiting Room and let people in. You will want to assign a co-host to help you with this task
- To set a Co-Host in the event:
 - Manage Participants.
 - Select Mute and More. Hover over More, select make Co-Host
- Mute guests:
 - Even if you have selected to mute everyone upon arrival, you may still have to mute all of the guests as the event starts.

Ask your speakers to arrive 10-15 minutes early:

- When your speaker joins the meeting, you may assign them as a co-host to allow them to share their screen

Participants can raise their hands to ask questions, rather than using chat. Monitor this feature:

- Select Participants and you will see Raise Hands in the right column.
- As the host, hand raising will be put in order as received.

POST EVENT:

To view and download your registration and attendance reports:

- Select Account Management > Reports
- Select Meeting and navigate to your event. Select the type of report you need, search by a date range to find the meeting, and then choose to Generate for the report

More information on reports can be found [here](#).

USEFUL TIPS:

- Always have a second staff member to help moderate, run the waiting room and hit record
- Have another stream of communication open (Google hangout, texting, etc.) in case of Zoom difficulties



ZOOM GUIDE FOR FACILITATORS

ZOOM PRESENTATION BEST PRACTICES

- Join the meeting at least 15 minutes early to check your AV, test out screen sharing (if using), and generally get comfortable in Zoom before your guests arrive.
- Curate your space and orientation to your web camera.
 - It's ideal to have natural light coming in from either side of your web camera or in front. Make sure you aren't backlit with a sunny window behind you.
 - Adjust your webcam so that it is naturally a bit above your eye level.
 - If you are reading notes or a script, keep them open on the top right of your screen so it looks as if you're looking into the camera as you speak.
- Shut down all other applications on your computer. Having a lot of programs open can tax your computer and internet connection.
- Mute everything else that must be open on your computer. Make sure you take the time to mute or turn off notifications for your email, texts, etc.
- Get comfortable speaking into the void. It can feel strange to present without any in-person audience feedback. Practice, be confident, and remember that we'll tell you if we can't see or hear you.
- In case of a technological glitch, have the Zoom link handy to rejoin quickly in case the connection is lost.
- Have a partner who is responsible for logistics and tech support. Connect via text or another platform outside Zoom to communicate privately if any technical issues come up.

SAMPLE SCRIPT FOR ZOOM MODERATORS

As attendees join the meeting, periodically say: "welcome, we'll get started in a few moments" as additional guests continue to join. This helps break up the silence as attendees arrive.

- Click on participants at the bottom of your screen to open the list of those who have joined. You can monitor when it feels like a majority have joined and it is time to kick-off the meeting.

Script for Zoom housekeeping at the top of the meeting:

- Welcome and thank you for joining us today. Before we dive into the agenda, I'd like to acknowledge that we're meeting virtually and want to take a couple of moments to orient everyone.
- Everyone is currently on mute. Please keep yourself on mute unless you are speaking. This helps eliminate background noise so that we can all hear the speaker. If you would like to unmute yourself, simply click unmute at the bottom of your screen.
- If you'd like to ask a question while someone is presenting, please submit the question via chat and I'll be monitoring the questions to be sure they are all addressed. The chat button is also at the bottom of your screen.
- At the top of your screen, you will see an option of either Speaker View or Gallery View. I'd recommend using Speaker View while our speakers are talking and then moving into Gallery View for Q&A.



SCRIPT FOR FACILITATING Q+A THROUGH ZOOM

- *[if you solicited questions during registration]* When you registered, we asked for you to submit any questions you had in advance. Thank you to everyone who sent in questions.
- *[if chat is active]* We've also been collecting questions through the chat function. You are more than welcome to continue to submit questions through chat.
- *[optional if you'd like folks to participate]* If you'd like to directly ask a question, please feel free to unmute yourself. (note: if you have your Zoom session set to Gallery View, you can see if folks are moving around and look like they may ask a question. Or, if you click on the participants list at the bottom of your screen, you can see who has unmuted themselves and call on them to ask a question).
- I've compiled those questions and will begin Q&A by asking those pre-submitted questions.
 - Insert submitted questions, group thematically and avoid repetition.
 - Insert a specific question to end on that is positive and ends Q&A on a high note.

UW ZOOM RESOURCES

Virtual Event Resources: <https://www.washington.edu/marketing/events/>

Downloadable Zoom Backgrounds: <https://www.washington.edu/alumni/zoom-backgrounds-for-huskies/>

Zoom Security Resources: <https://itconnect.uw.edu/connect/phones/conferencing/zoom-video-conferencing/security-settings/>

Adapted from the UW Medicine Advancement Virtual Event Toolkit

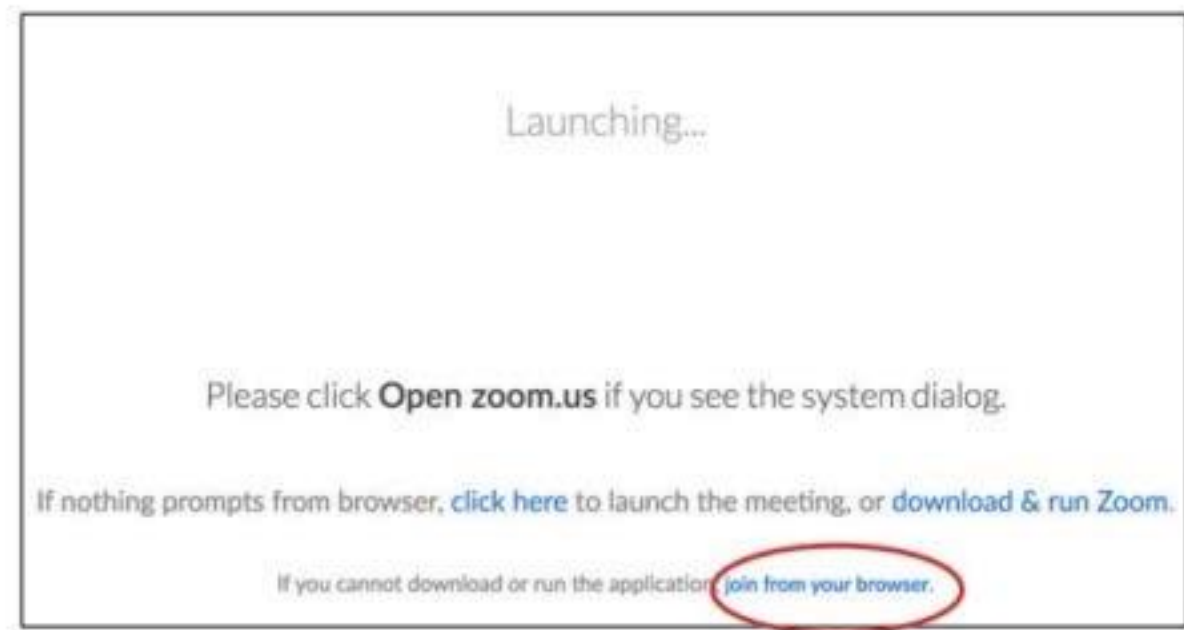


ZOOM GUIDE FOR PARTICIPANTS

JOINING A ZOOM MEETING

Step 1: The easiest way to join a Zoom meeting is by clicking the meeting link provided upon registration. It will begin with <https://washington.zoom.us>. You can practice joining a Zoom meeting by clicking on this link to [JOIN A TEST MEETING](#) hosted by Zoom.

Step 2: It isn't necessary to download and run the Zoom application to join a meeting. Just click join from your browser in the bottom, right of your screen.



Step 3: Enter your name to join the meeting. Then click the Join button.

Please enter your name to join the meeting

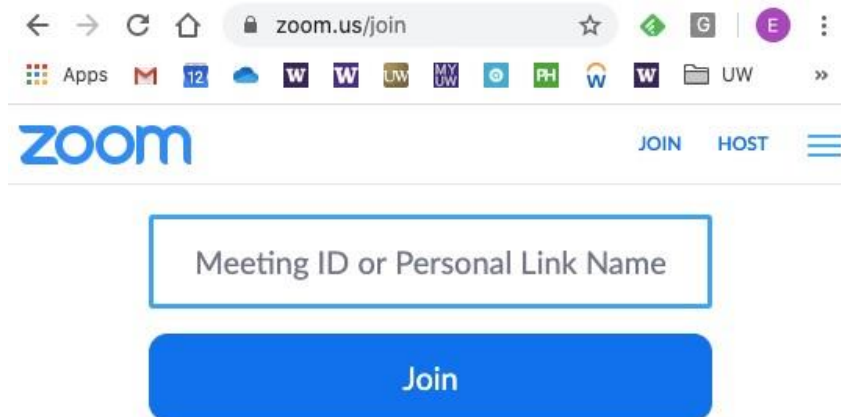
Your Name

Your Name

Join



Step 3 Alternative: If you do not have access to the direct meeting link, you may connect by manually entering the Meeting ID at <https://zoom.us/join>.



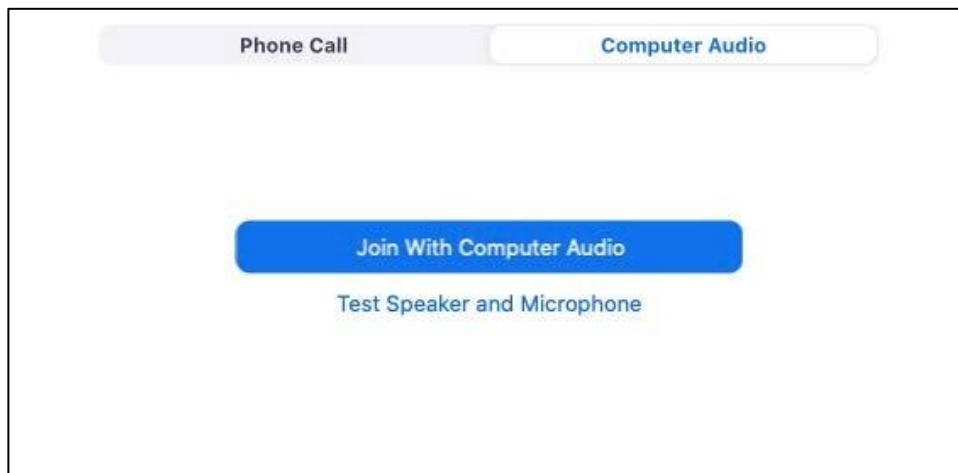
If the meeting requires a password, you will be prompted to enter the password after clicking the Join button.

Additional help from Zoom: For more information, and to watch videos on how to join a Zoom meeting, visit the Zoom Help Center page on [Joining a Meeting](#).

YOUR ZOOM MEETING CONTROLS



Click on this icon to select the source audio for the call. Click on **Join Audio by Computer.** You can also test your computer audio by clicking on **Test Speaker and Microphone.**





When you join a Zoom meeting, you will see a black bar at the bottom of your window with your meeting controls:



Zoom Meeting Control Icon	Description
	Once your audio is connected, you will see the Microphone icon. You can click on this icon to Mute and Unmute your microphone. At times, your meeting host may have disabled the option to mute.
	Click on the Camera icon to start and stop your video. If you see the red slash through the camera, that means your video is off.
	The Participants icon tells you how many people are currently in the meeting. Click on the icon to open your Participant Controls .
	The new panel that opens after clicking the Participants icon lists the meetings participants and has the Participant Controls . These buttons can be used to provide non-verbal audience feedback during the meeting
	The Reactions icon is where you can quickly access more non-verbal communication options. From this icon, you can choose a Thumbs Up or Clapping emoji that will appear on your image when clicked.



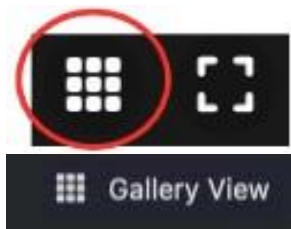
CHANGING YOUR MEETING VIEW

You can choose between two different **meeting views** in Zoom: **Speaker View** or **Gallery View**.

Speaker View highlights the screen of the individual speaking during the meeting or presentation. The speaker will appear in a large tile and all meeting participants appear in small tiles above the speaker. This is the default view when you join a Zoom meeting. Speaker view is ideal for ensuring all attention is on the one person speaking.

Gallery View allows you to see multiple meeting attendees at one time. All participant tiles are the same size and fill your window. Gallery View is ideal during conversations when you would like to view all participants. A yellow box will highlight the active speaker so you can quickly see who is speaking.

You can switch between **Speaker View** and **Gallery View** by clicking the **View Option** icons at the top right of your Zoom Window.



When you are in **Speaker View**, you can click on the Grid Icon or Gallery View icon in the top right of your window to switch to Gallery View.



When you are in **Gallery View**, you can click on the **Speaker View** icon in the top right of your window to switch to the **Gallery View**.

Presentation Mode is the view you will automatically get when a meeting host shares their screen to show a video or slideshow. Once presentation mode ends, your view will revert to Speaker View. You can change back to Gallery View by following the instructions above.

ADDITIONAL QUESTIONS?

Check out the Zoom Help Center for more information and tutorials. Below are a few links to get you started:

- [Zoom Help Center: Frequently Asked Questions](#)
- [Zoom Help Center: Getting Started](#)
- [Zoom Help Center: Joining a Meeting](#)
- [Zoom Help Center: Testing Your Audio](#)
- [Zoom Help Center: Virtual Background](#)
- [Zoom Help Center: In Meeting Chat](#)
- [Zoom Help Center: Video Layout](#)
- [Join a Zoom Test Meeting](#)