MEETINGS

ZOOM EVENT PRODUCTION CHECKLIST

When planning an educational event on Zoom, the working group, including Producers/Facilitators/Presenters, should discuss details in advance. If one person is responsible for both facilitation and production of the event, this checklist can and should still be used to guide planning.

EVENT DETAILS

Item	Information	Lead
1. What is the purpose of the event? What are the expected outcomes?		
2. How many participants are you expecting?		
3. What is the title of the event?		
4. Description of event		
5. What is/are the event date(s)? *		
6. What is the start time? End time? Break times?		
7. Who is accountable for the event and who is responsible for the event? *(using RACI)*		

* Best practice is a minimum of 6-8 weeks (depending on event details) of lead time is required - any short notice would substantially lessen the quality and responsiveness of a session.

ROLES

The **Producer(s)** is/are mainly behind the scenes, managing administration of the event in the background. The production roles might include:

> Private chat support

> General chat management (including cut & paste activity instructions into chat)

> Breakout session management (host only)

> Wait room management and/or review of unnamed participants

The **Facilitator/Presenter*** is the person presenting the information or training, managing and explaining activities, etc.

> *Note that the Facilitator/Presenter is not necessarily the "host" of the meeting in Zoom. In fact, it is often best to assign the Producer as the host in order for the Producer to be able to manage breakout rooms, etc.*

The **IT Support person** is the person responsible for addressing technology issues such as connectivity and connecting to audio/video.

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BEST PRACTICES

These best practices are intended for events (e.g., education sessions, assemblies, town halls) as opposed to meetings.

1. **Always have at least a Facilitator/Presenter and a Producer**, regardless of the number of participants. An event with greater than 50 participants should have least 2 Producers in addition to Facilitator/Presenter(s).

2. The more **interactive** the event, the more production support is needed.

3. Facilitators/Presenters and Producers should be **cross-trained** and understand Zoom host vs co-host functionalities and limitations.

4. **Dry runs / practicing** with ALL Facilitator/Presenter(s) and Producer(s) is a necessity, particularly for breakouts. Practice should happen with everyone performing the roles they will hold during the event.

5. All Facilitator/Presenters and Producers should be on **hard-wired internet**, not Wi-Fi.

6. Planning should include a **master comprehensive outline** of the entire event that includes:
    > The master presentation (e.g., all slide decks integrated)
    > Facilitator/presenter scripts
    > Production notes (including producer roles, slide deck transitions, producer scripts, cut & paste links in chat, sharing of documents, etc.)
    > Timing (for sessions, breaks, activities)
    > Activity instructions (e.g., breakout instructions)
    > Handouts (FAQs, pre- & post-event resources including etiquette, links page in a Word document)
    > Polls (if used)
    > Evaluation survey/form

Role	Name & Title	Day-of Contact Information
Facilitator(s)/Presenters		
Producer(s)		
IT Support Person(s)		

continued

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ZOOM EVENT PRODUCTION CHECKLIST *continued*

Event Setup and Invitations	Discussion Notes	Person Responsible Facilitator/Producer/?
1. Will the session be set up as a meeting or a webinar?		
2. Who will create the session in Zoom? Who will be the Zoom host? Who will be assigned as alternative host(s)? Co-host(s)?		
3. Will you enable the waiting room?		
4. Will you enable breakout rooms? If so, will you determine breakout room lists in advance or use random assignment?		
5. How will the invitation be shared? *(e.g., as an Outlook calendar invitation, as a Zoom link in an email or through CVent, etc.)*		
6. Participant audio & video settings Are participants to be muted and have their cameras disabled on entry?		
7. Will the producer(s) be managing participants' audio/video functions (e.g., asking to unmute)?		
8. Will you record the session? * *If so, who will be responsible for editing/ managing the video?*		
9. What can you do to address accessibility of this event for attendees with varying accessibility needs?		
10. Will you include instructions for updating to the latest version of Zoom, how to access Zoom support, etc., in the event invitation?		
11. Is there any training/instruction necessary for attendees to fully participate in the event? If so, what training/instruction will be provided? *(e.g., "How to Participate in Zoom Sessions" webinar)*		
12. What are the expectations of attendees (e.g., will they be expected to have cameras enabled?), and how will these be shared? (e.g., Zoom session etiquette sheet)		

> To determine what kind of Zoom platform will best meet the needs/goals of the event, use the **comparison chart** that Zoom has put together for this purpose.

* Recording can be helpful for accessibility (giving participants the option to review something they missed), as well as record-keeping for the organization. However, recordings that are to be shared might need editing and additional resources after the event. If recording, participants must be advised of this in advance. Note that breakout rooms are not recorded.

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ZOOM EVENT PRODUCTION CHECKLIST *continued*

Presentation Management	Discussion Notes	Person Responsible Facilitator/Producer/?
1. If using a slide deck, who will share screen, advance slides, etc.?		
2. How will breaks be signaled and managed? *(e.g., "break" slide, countdown timer, playing a song when break is almost over)*		
3. Who will share any videos? Has video display been tested in advance? *(ensure to check "share computer sound" option on share screen)*		
4. Will both producer and facilitator have a copy of the final slide deck as backup in case of technical difficulties?		
5. *Will both producer and facilitator have a copy of the presenter notes as backup in case of technical difficulties?*		
6. Who will manage the wait room, if necessary? Who will check for and rename unnamed participants, if necessary?		

Engagement Tools	Discussion Notes	Person Responsible Facilitator/Producer/?
1. Chat (and/or Q&A for webinars) *Will you be using the chat box and/or Q&A (webinar only)? Who will manage these tools?*		
2. Raise Hand *Who is responsible for monitoring & lowering hands? Will you need to "Allow participants to unmute" if they're called on? (webinar only)*		
3. Reactions *Which, if any, are participants encouraged to use and how?*		
4. Annotations *Will annotation tools be used and if so, how? If participants will be expected to use annotation, do they know how?*		
5. Sharing Screens *Will participants be sharing screens? If so, how will this be managed?*		

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ZOOM EVENT PRODUCTION CHECKLIST *continued*

Engagement Tools *(continued)*	Discussion Notes	Person Responsible Facilitator/Producer/?
6. Video Filters *Will participants be allowed to use video filters?*		
7. Polls * *Consider if all questions should be in one poll, or in separate polls. For each poll, decide:* > *Poll purpose* > *Poll name* > *Poll question(s)* > *Poll response options* * Polls should be set up in advance.		

Breakout Sessions (Meetings only)	Discussion Notes	Person Responsible Facilitator/Producer/?
1. What is the activity description? Include purpose and expected outcomes.		
2. What are the activity instructions?		
3. What is the timing for the activity?		
4. What tools will breakout participants be expected to use? *(e.g., whiteboard, annotate, etc.)*		
5. Are groupings to be set in advance or random?		
6. How much support will be needed in breakout rooms, and how will this be provided? *(e.g., "ask for help" function, facilitator in each breakout, etc.)*		

ZOOM EVENT PRODUCTION CHECKLIST *continued*

Engagement Tools	Discussion Notes	Person Responsible Facilitator/Producer/?
1. Evaluation Survey *Who will create the evaluation survey?* *Who will send out the evaluation survey?* *Who will compile survey results into a report and share with planning group?*		
2. Assignments *Were there any activities to be completed after the session? What follow up needs to be done on these and by whom?*		
3. Future Meetings *Is there a need to book another meeting? Who will do this?*		

ANYTHING ELSE?