

Using Zoom for Online Facilitation

Introduction	2
Setting up in advance	2
Registering and downloading Zoom:	2
Configuring your settings:	2
Testing your camera, speakers and microphone:	2
Setting up and starting a seminar	3
How to schedule a seminar	3
Starting the seminar	5
Admitting participants from the waiting room	6
Using the Zoom features during a live seminar	6
Mute and unmute yourself	6
Start your video	6
View other participants/attendees	6
Using the chat box	6
Sharing your screen/present something	7
Breakout rooms	7
Using polls	8
Troubleshooting issues	9
Appendices	9
Addressing security concerns reported by the media	10

Introduction

Teach First's live seminars will take place over Zoom, a video conferencing tool and we recommend this as a tool for Delivery Partners to use to deliver their seminars. A live seminar over Zoom will allow you to hear and see your attendees, view presentations, facilitate and engage in group discussions. This guidance is to support you with the facilitation of the live seminars to Programme Members via this platform.

Setting up in advance

Registering and downloading Zoom:

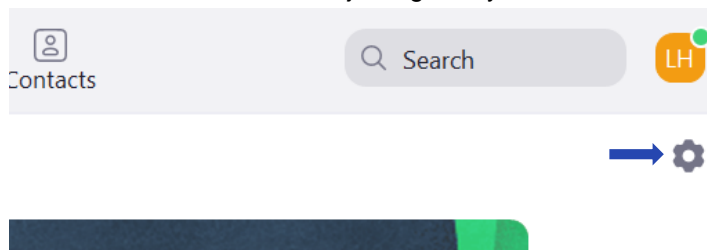
We strongly recommend downloading the Zoom Desktop Client [here](#) to use Zoom as a desktop app so that you can access all the features (e.g. polls and the whiteboard). However, if your device has a firewall that prevents you from downloading Zoom, you will be able to access Zoom through your internet browser. If using internet browser we strongly recommend testing the features before your first seminar to ensure you can deliver effectively. We recommend passing this advice onto your Programme Members as well – if they are unable to use the Zoom desktop app, they may not be able to participate in some in-seminar interactive activities.

For further information on getting set up with Zoom view their guide [here](#).

Configuring your settings:

Configuring the Zoom tool will allow you to control what happens when you enter a Zoom meeting, for example, whether you enter a meeting on mute, or whether your webcam is automatically switched on or off when you enter a live seminar.

1. Open the Zoom client
2. Sign in if prompted (tick the box to remember you in the future).
3. Click on the settings cog on the top right of the tool. It is recommended that you review the 'General', 'Audio' and 'Video' tabs to check and amend your settings.
4. As facilitator, we recommend joining with your audio and video turned on.



Testing your camera, speakers and microphone:

From here, you will also be able to test your speaker and microphone settings to make sure they work (in the 'Audio' tab). You can also test your settings each time you enter a meeting (you will be prompted to do this when you connect with audio to the meeting). You can test your webcam in the 'Video' tab. Please note that having working audio and video settings correctly configured and working (speakers and microphone) is vital to your participation in Teach First online seminars.

Top tip! You can join a test meeting [here](#) to test out Zoom ahead of your first seminar.

Setting up and starting a seminar

How to schedule a seminar

Click on the Schedule icon. This will open the scheduler window.



Schedule

Select your meeting settings. (Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.)

Topic: Enter a topic or name for your meeting.

Date & Time:

- **Start:** Select a date and time for your meeting. You can start your meeting at any time before the scheduled time. You can also manually enter any time. For example, you can enter **15** in the minutes field to schedule a time with a 15-minute increment.
- **Time Zone:** By default, Zoom will use your computer's time zone. Click the drop-down menu to select a different time zone.

Recurring meeting: Choose if you would like a recurring meeting (the meeting ID will remain the same for each session).

Meeting ID

- **Generate Automatically:** Generate a random unique meeting ID.
- **Personal Meeting ID:** Use your Personal Meeting ID.

Security

- **Passcode:** Enter a meeting passcode. Joining participants will be required to input this before joining your scheduled meeting.
Waiting Room: Enable Waiting Room for the meeting.
- **Only authenticated users can join:** Restrict access to the meeting so that only signed-in users can join. Teach First **do not** recommend turning this on – schools' firewalls can make signing in problematic.

- **Encryption:** Choose between the standard **Enhanced encryption** and **End-to-end encryption** for your meeting.

Video

- **Host:** Choose if you would like the host's video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
- **Participants:** Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video.

Audio: Allow users to call in using **Telephone** only, **Computer Audio** only, **Both**, or **3rd Party Audio** (if enabled for your account).

Dial in From: If **Telephone** or **Both** is enabled for this meeting, click **Edit** to select the dial-in countries to include in the invitation. By default, this includes your **Global Dial-In Countries** listed in your meeting settings.

Calendar: Select a calendar service to add the meeting to and send out invites to participants.

- **Outlook:** Open the Outlook desktop app and create an event for the meeting.
- **iCal:** Open iCal and create an event for the meeting.
- **Google Calendar:** Open Google Calendar in your default browser and create an event for the meeting.
- **Other Calendars:** Open a new window, where the meeting text can be copied pasted into the user's preferred communication method. You can also download an ICS file which can be opened in most email applications.
- **Advanced Options:** Click on the arrow to view additional meeting options.
 - **Allow participants to join before start time:** Allow participants to join the meeting without you or before you join. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting. If enabled, you can also choose how far in advance of the scheduled start time you wish them to be able to join: 5 minutes, 10 minutes, 15 minutes, or Anytime. If you turn this on, participants will bypass the waiting room – Teach First **do not recommend** turning this on, unless you are delivering a seminar that doesn't require a host.
- **Mute participants on entry:** If join before host is not enabled, this will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.
- **Request permission to unmute participants:** Participants will be prompted to provide the host with consent to be unmuted at will by the host. If declined, the host will still have the option to **Ask to unmute**.
- **Automatically record meeting:** Select if you want to record **Locally** (to your computer) or **In the cloud**. If recording is necessary, any breakout sessions should not be recorded (to allow for open

and honest conversation), and participants should be made aware of how/where this will be shared/used.

- **Approve or deny entry to users from certain regions and countries:** Host can either allow only participants from specific counties/regions to join, or block all participants from specific counties/regions.
- **Schedule for:** If you have scheduling privilege for another user, you will be able to choose who you want to schedule for from the drop-down menu.
- **Show in Public Event List:** Add the meeting to a public calendar associated with your vanity URL.
- **Alternative hosts:** Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence.
- **Interpretation** (only supported in Windows and macOS clients)*: Enable language interpretation for the meeting.

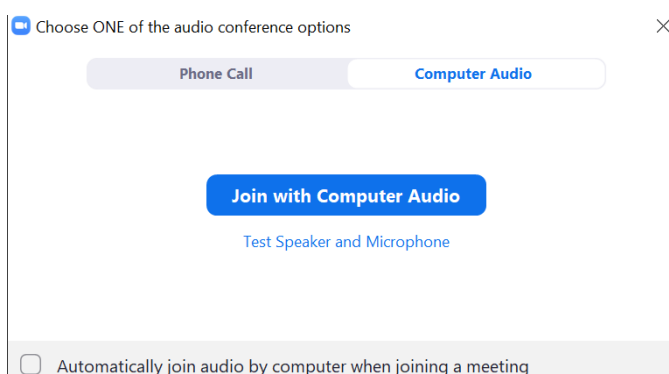
Click **Save** to finish, and open the selected calendar service to add the meeting.

Note:

- If you are scheduling a recurring meeting, you will need to set the recurrence in your calendar service.
- Choosing **Other Calendars** will allow you to copy and paste the scheduled meeting information such as date, time, and meeting URL

Starting the seminar

Once the Zoom app opens, it should prompt you for your audio settings. It's advised that you first test your speaker and microphone to make sure these are working, then click "Join with Computer Audio" to join (as per the screenshot below).

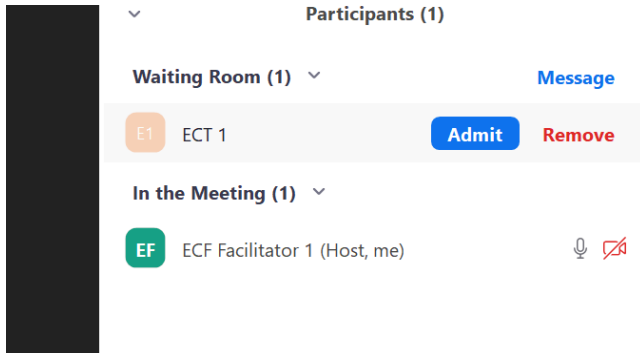


You can tick "Automatically join audio by computer when joining a meeting" to save this step in future.

You will be the 'host' upon joining. This means you should be able to access the meeting immediately on joining, will have full control to use all features and will be able to allow people in from the waiting room.

Admitting participants from the waiting room

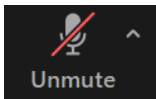
Attendees will be placed automatically in the waiting room on arrival. When you are ready to admit them and begin the session you can allow them access by clicking the 'Participants' icon from the toolbar. A pop up will appear to the right and you can then 'Admit' people from there.



Using the Zoom features during a live seminar

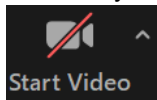
Mute and unmute yourself

Click the microphone icon at the far left of the toolbar; you may find that when you join a live session you are muted automatically. When you are muted the icon will have a red line through as shown below.



Start your video

To start your video, click the "start video" icon. Your video will then be visible by all attendees. You can stop this at any time by clicking the icon again, though it's encouraged to keep this on throughout.

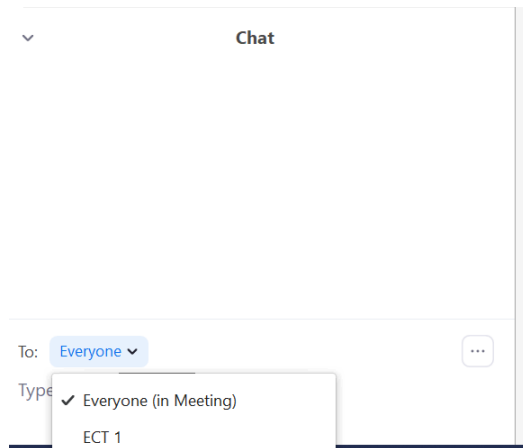


View other participants/attendees

It can be useful to see who is still within the meeting; you can do this by clicking the "participants" icon in the middle of the toolbar. A list of attendees should then appear to the right of your screen; you will have (host) after your name as the person who is facilitating the session, though sometimes there will be multiple facilitators/hosts e.g. if there is additional Teach First staff member in the session.

Using the chat box

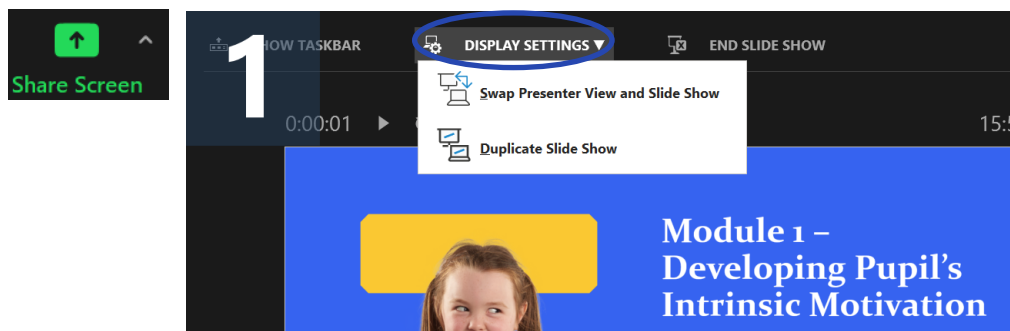
The chat box is a useful way to engage the group in discussions, answer any questions and ask for/share feedback. To use this, click the "chat" icon and a chat box should appear to the right. You can send messages to the whole group or to an individual, simply click the drop-down option next to "To:" to change who you are addressing (see screenshot below). As a default this will be set on "Everyone".



Sharing your screen/present something

You will need to share your screen during live seminars with the slides provided to you beforehand. You can do this by clicking the “Share” icon in the middle of the toolbar. You can also access the whiteboard feature from the “Share” icon.

Select which item you want to display and click “share”, your screen should then share automatically, but you may need to “swap” your screen view, to get the presentation to show up as the main image. You or



attendees can swap your screen view once in sharing mode, via the small icons that will appear in the top right of the main frame, as shown below.

Breakout rooms

During the session you may wish to place participants into breakout rooms to allow for smaller, more focused discussions. You can do this by clicking the “more” icon shown as 3 dots.

From here select breakout rooms from the drop down list. A pop-up will then appear and you will be able to select how big you want the group sizes to be and whether you want the rooms to be assigned automatically, manually or if you want participants to choose their own room. Participants can only self-select and see the ‘choose breakout’ option if they are accessing Zoom via the desktop app, rather than the web browser. As it is likely that at least a few participants will access it via the web browser, the host will have to put these participants into the breakout rooms manually.

Create Breakout Rooms ×

Create breakout rooms

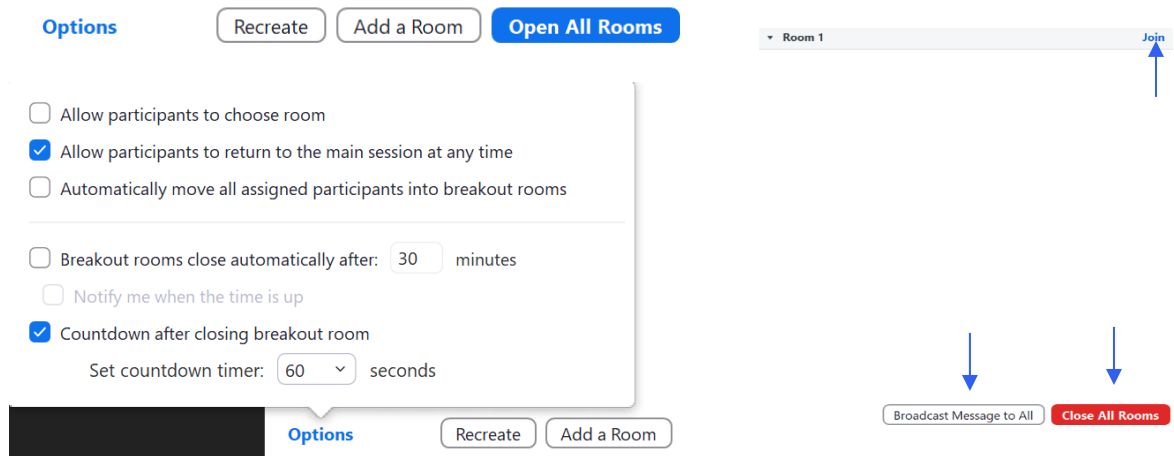
- Assign automatically
- Assign manually
- Let participants choose room

0 participants per room

Create

Press create, and the breakout rooms will be displayed. Once happy this is organised effectively, press “Open all rooms”. All attendees should then have a pop up appear on their screen to ask them to join their breakout room.

From here, you’ll then be able to join different rooms, send a broadcast message to all rooms, or close all the rooms to return attendees to the main session, using the buttons displayed below. You can also use “options” to adjust the settings, for example, if you want the rooms to close after a certain amount of time or set a timer to notify attendees how long they have left until they will re-join the main session.

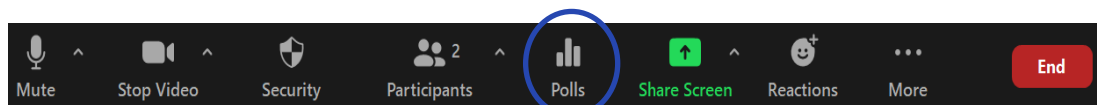


Please note that, once they have moved to the breakout room, attendees won’t be able to see any shared slides or presentations, so prompt questions should be shared in advance.

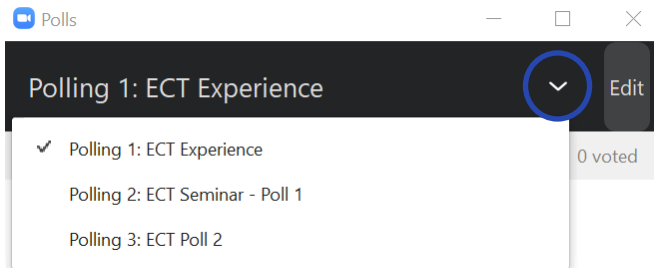
Using polls

Another feature which can be useful for attendee engagement is the polling feature. Through this you can create questions to check for understanding and/or ask how attendees feel about topics or issues.

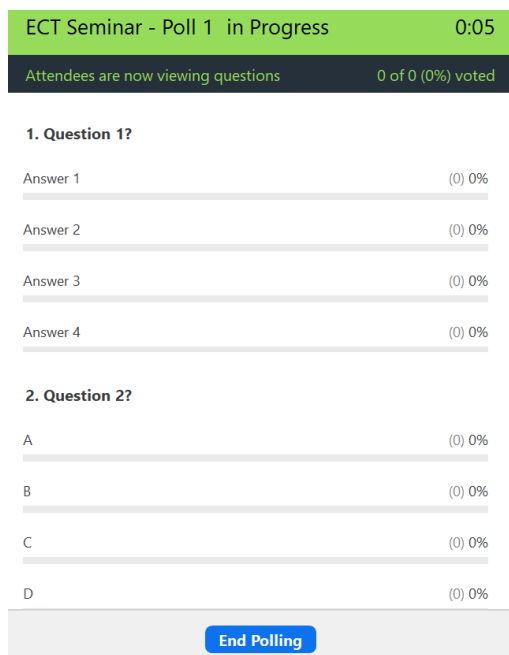
When you are the host, the poll feature will appear as an icon in your tool bar.



If polls are needed these will be set ahead of time ready for you to use. Multiple polls can be made available and you can then select the relevant one if needed within the meeting by using the drop-down arrow that appears at the top of the pop out. You can also edit the questions from here if needed.



Once selected click 'Launch polling'. The poll will go live and a timer will commence in the right hand corner. You will be able to see what percentage of attendees have voted under each option. When everyone has answered or after a designated amount of time, click 'End Polling'. The answers will be visible for you and you will then be able to 'share' these or 're-launch polling' to get attendees to vote again.



Close the pop-up window when you are no longer wanting to use the poll feature.

Please note that participants can only see the poll feature if they are accessing Zoom via the desktop app – they won't be able to see it at all if they are accessing it via web browser.

Similarly, if they access via a web browser rather than the desktop app, they will only be able to view a whiteboard and not edit it.

Appendices

Addressing security concerns reported by the media

Teach First conducted an extensive procurement process for selecting a tool for virtual conferencing. Our requirements included meeting the high standard of data security required by the Department for Education as well as delivering the functionality to deliver our seminars virtually. A number of high-profile organisations have approved Zoom for use, including the British Parliament.

1. Operating system exploits have been, and continue to be, patched. Please ensure you always update your software when notified.
2. Zoom calls are encrypted. Media reports about its lack of end to end encryption refer to the fact that data is not encrypted on the Zoom server, which is highly secure. This server is located in the EU.
3. There has been concern that personal details were shared with other users. This was caused where users had a common email address (e.g. @teachfirst.org.uk) being added to a corporate directory in Zoom. This caused problems for non-corporate accounts, e.g. Hotmail. This has now been fixed and it no longer creates directories for personal email addresses.