# Zoom Best Practice and Sample Scenarios

## General Best Practices

1. **Setup for security and privacy before you start**

   - Create zoom settings that can best protect your audience's personal data and make a safe meeting space
   - Review your default account settings in the browser-based version of Zoom and disable any features not being used in the program

2. **Make the most of the time before your program starts**

   - Use the waiting room to let patrons 'arrive' early
   - Setup the 'Zoom Waiting Room' with a library logo
   - Send people a message in the waiting room letting them know they are in the right place.
   - Consider having a Welcome Slide shared on your screen as you let people into the room - this is better for adult programs.

3. **Manage expectations early and often with your audience**

   - State the ground rules for who can talk and when, when to un-mute mics, expectations if video is necessary or desired etc. -- remember each program is different
   - Explain who the co-host is and how they can help
   - Have kids practice responding by using the reaction buttons and chat feature.

4. **Have a Co-host whenever possible**

   - The 2nd staff person assists with questions in chat, manages the room, and offers support to individual patrons to avoid distracting the primary staff person from the main program presentation
   - Provides back-up in the case that the primary presenter loses their internet connection. Co-host should have program outline and supplies in case they have to take over.

5. **Do not use tools you do not need**

   - Disable or discourage the use of any tool you do not intend to use
   - Things to consider: Do you want typing in chat, screen-sharing, white board use, webcam enabled, or participant mics turned on?

6. **Have a basic plan for bad situations**

- Make brief notes to yourself to note how you want to handle certain problems like a racist comment, someone not turning off their mic, etc. How you handle situations will depend on the audience and program. Discuss with your co-host before the program.

# Sample Scenarios

## Technical Difficulties

| Scenario | Possible Solutions |
|---|---|
| Host or Co-host connection breaks down and they disappear from the program | <ul><li>Ensure co-host has all program materials before the start of the program in case they need to take over.s</li><li>Have back channel communications set up, i.e. phone numbers.</li><li>If the Host freezes or bounces out of the meeting, Co-host turns on their camera and informs the audience they are experiencing temporary technical difficulties and buys some time.</li><li>Consider having an interesting screenshare ready to occupy the audience while troubleshooting -- e.g. share a browser window with a relevant YouTube clip.</li><li>If the problem persists, Host and Co-host make a decision whether or not to end the program. A good upper limit that people should be asked to wait is 10 minutes.</li><li>If the program must be cancelled due to ongoing technical difficulties, inform the audience they will be notified by email if/when the program is going to be rescheduled.</li></ul> |

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| Audience member is having trouble using Zoom app or is experiencing technical difficulties | • Co-host works with patron using direct chat feature, providing some links and basic troubleshooting information.<br><br>• Often leaving the meeting and coming back in resolves problems. If you advise a patron to leave, make sure you unlock the room so they can return. |
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| Camera won't work | • Check to make sure all other programs that use the webcam are closed.<br><br>• Check app permissions to make sure the Zoom app or your web browser can use the webcam. |
| Audio echos | • The patron may have their computer and telephone audio active at the same time; either hang up the telephone mode or leave audio during the conference (click the up arrow next to the microphone icon in the bottom left and choose *Leave Computer Audio).*<br><br>*OR*<br><br>• The patron may be using speakers that are too close to the mic. |

Notes:  Zoom requires a lot of bandwidth. Spotty or slow internet can result in a poor user experience that is largely beyond our control. If one participant finds the video slow/choppy but no others have this same problem, it is their individual connection. One solution we can suggest is that they turn off or close any applications, programs or websites that may be hogging their connection. Beyond this, do not try to troubleshoot network issues with participants.

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## Privacy and Security

| Scenario | Possible Solutions |
|---|---|
| Non-registered person enters the waiting room | • If this is before the program begins, decide if 'drop-ins' work for your program model. If the person is not registered for the program, you can make a decision on whether you will allow them to stay based on the program.<br><br>• After letting the person in from the waiting room, you can communicate with participant by chat to determine if they know what they're dropping in to.<br><br>• It's possible that the person is logging in with a different device or account than the one they registered with. This is common with kids. You can let them into the meeting and ask them their name and check it against the registration list. Then rename the attendee. |
| Parent enters program with questions or concern about the program—content or platform | • Co-host privately messages parent with brief information, and a link to either the program description and/or an FAQ. Emphasize that the library has procedures in place to protect the privacy and security of participants within a reasonable limit, though ultimately it is a public program online. Offer to answer any additional questions and send email address for any follow up. |

Notes: It is the library's duty to protect our patrons' privacy to the best of our abilities. Zoom has had issues with user security, and our guidelines provide information about how to leverage Zoom features to increase data protection.
The ALSC blog produced this excellent primer at the beginning of the Covid-19 pandemic:
https://www.alsc.ala.org/blog/2020/04/virtual-programming-and-patron-privacy/

Best practices include educating our users (and their parents and caregivers) on how best to protect their data. We recommend online programmers know the basics of how their platforms collect and use personal information. Remind the audience the meeting is NOT being recorded.

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## Communication: Video and Voice Chat

| Scenario | Possible Solutions |
|---|---|
| This is the first program with a new group and not everyone knows each other | • Start with a ice breaker activity. Encourage but don't require people to turn on webcams and mics. |
| Attendee is somewhere with distracting background noise. | • Co-host mutes microphone. Co-host can give a verbal reminder to stay muted if you're in a loud place or they can send a private message to the chat suggesting they move location or use headphones.<br><br>• If neither of these is possible, co-host messages to attendee that their mic will be left muted and they can participate by chat. |
| Attendee keeps talking over others. | • The Co-host mutes their microphone, and sends a private message with expectations of behaviour.<br><br>• If the problem happens constantly, place the person in the meeting room and send a message asking them to please keep their mic muted/off. Let them back into the program.<br><br>• If it is especially egregious, remove the participant from the program completely. |

Notes: Audience members may not wish to be on camera. Make a decision whether to require camera participation at the beginning or throughout the meeting.


## Communication: Text Chat

| Scenario | Possible Solutions |
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| Patron posts inappropriate messages with racial, sexual or otherwise harassing content. | • Co-host removes patron from program, posts reminder in chat box that inappropriate messages will result in removal. No warning needed. |

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| Patron monopolizes chat, adding comments that are not relevant to the program or posing multiple questions to the point where they are drowning out other participants. | • For kids and teens, a gentle verbal reminder will often do the trick. You can ask them to share their thoughts in the chat instead of saying them out loud or waiting until you ask for participation.<br><br>• For adults, co-host uses private message function asking them to a) respect the presenter and audience by reducing distractions and/or b) hold questions to the end<br><br>• If patron persists, Co-host places attendee in the waiting room and sends a message stating that the attendee is distracting from the program and will be removed if they persist. |
| Audience members using mobile devices find the chat box blocks their view | • The chat box can't be moved out of the way on a mobile device. Attendee will have to close the chat box by clicking 'Chat'. They will still be notified of new chat messages. |
| Chat channel is full of many questions and comments by multiple people, distracting patrons and making it difficult for the Host to track questions. | • Co-host triages questions to the host, tells people in chat that not all questions may get answered during the program, and, if possible, suggests other channels [i.e. phoning the Library information number after the program]<br><br>OR<br><br>• Co-host turns off chat until Host is ready to take more questions. |

<u>Notes:</u> Text chat is a good way to allow for audience members to ask questions or share information, especially for the camera shy. However, text can be misused or disruptive.
At this time, offensive chat messages cannot be removed from the chat window in Zoom.

## Screenshare, Annotation

| Scenario | Possible Solutions |
|---|---|
| When I share the screen, it shows the wrong images or I have a hard time navigating what people see | • Test the 'screenshare' function with a colleague beforehand, especially if you have content that requires scrolling. Activities that involve only a single piece of media work better with 'share a window' mode, but anything requiring multiple sources (powerpoint & web browsers) should use the 'share screen' mode. These options appear when you click the screen share button at the bottom of your window.<br><br>• Open all tabs that you need and close the ones you don't. Remember not to have anything private open (like e-mail).<br><br>• Explain verbally what steps you are doing at each point of a screen share demo to assist in understanding.<br><br>• Ask the co-host to take over if you can't get it working at all |
| Kids start using the annotation tool to draw on the shared screen. They cover up what you are trying to show and make it hard to do the activity. | You have options:<br><br>• Temporarily disable the annotation feature for participants.<br><br>• Ask kids to stop annotating<br><br>• Give kids a few minutes to go wild with annotations and then ask them to stop (give them a chance to get it out of their systems/practice).<br><br>• If someone refuses to stop annotating and you need to keep the feature enabled, you can place them in the waiting room and send them a message |

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| • A participant loves the drawing the group created on the whiteboard and wants you to send them a picture of it | • Let them know that in order to keep everyone's information private we can't save whiteboard images.<br><br>• Try using a snipping tool to save a cut-out of the specific image and email it to them<br><br>• Encourage them to create the drawing again in a Zoom meeting with a friend |

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