

Using Zoom Webinar to hold public meetings

Published April 6, 2020

We've been working to help so many public agencies figure out how to hold remote public meetings using Zoom Webinar that we decided we'd write our own guide! This content is part of a series we've written on helping special districts communicate during a crisis. [All of the resources can be found online.](#) Zoom also has many [online tutorial videos.](#)

Zoom software will likely be continuously updated and some options may change by the time you're reading this. (Also, we aren't affiliated with Zoom in any way - not even as a reseller or referral partner. Just trying to help!) We are focusing on the Zoom Webinar product (even though it's a bit more expensive than just using Zoom Meetings) because it gives you much more control over public participation.

Because of the nature of public meetings, many of the features that will help other folks control meeting behaviors (password protecting, requiring registration) aren't going to be useful, since your meetings have to be open and public. But you can make this work with just a few tweaks to the standard Zoom Webinar functionality.

It may help you to know that when I use the word Webinar in this document, I am referring to the **Zoom Webinar product**. When I use the word "meeting" I am talking about your **public meeting**, which you will host using the Zoom Webinar product.

Clear as mud? :) Let's dive in!

– Sloane

What you'll need



✓ A computer with internet access (preferably with a camera, mic and speakers)



✓ 20-30 minutes of time to complete this tutorial



✓ A credit card number



✓ A paid Zoom Meeting account that you will upgrade [\(what's this?\)](#)



✓ A list of all the board members' email addresses

Additionally, you'll want to devote some time to **practicing** before your first live meeting. Once you get it set up properly, and get some practice under your belt, you'll be great at this!

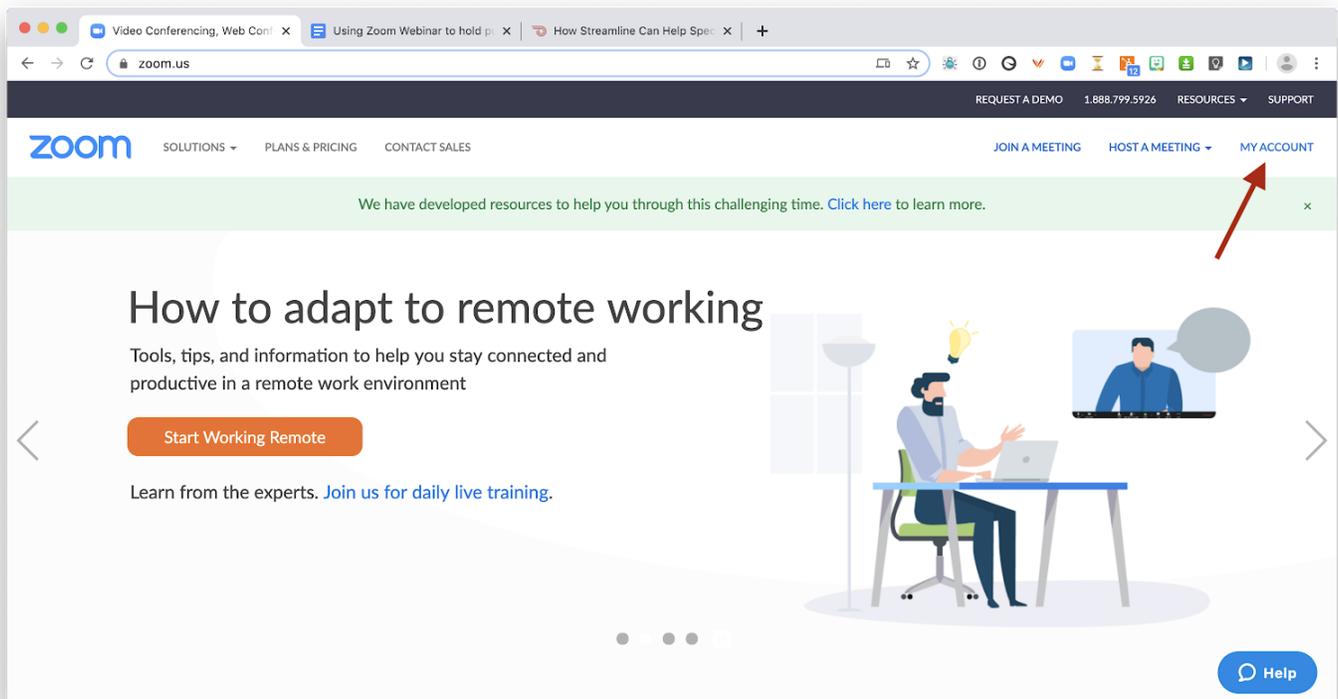
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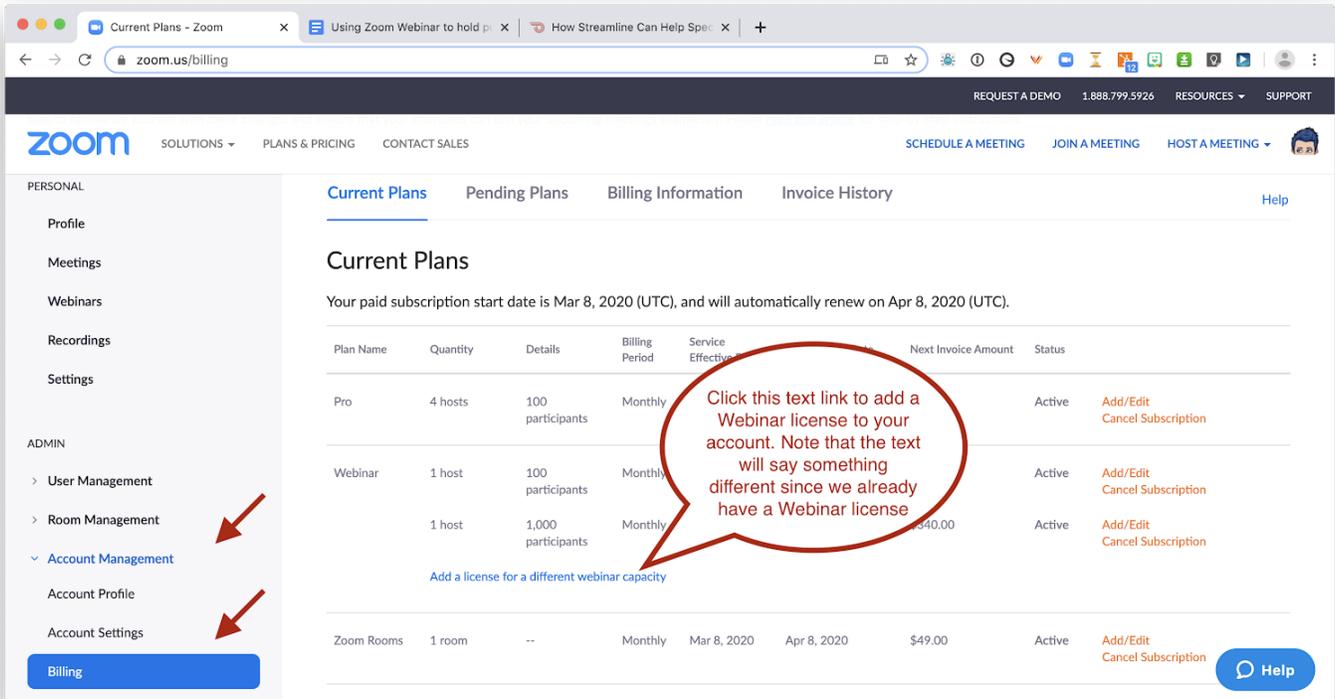
Adding the Webinar functionality to your Zoom Meetings account (required)

After setting up your initial [Zoom Pro Meetings account](#) (the Basic / free account won't work, you need to sign up for the Pro account), you'll need to buy the Webinar add-on for one Host. (You don't need more than one - the Host can set up and configure the Webinar, and everyone else can participate as a Panelist using a Zoom Basic free account, or just via email invite. More on that later.)

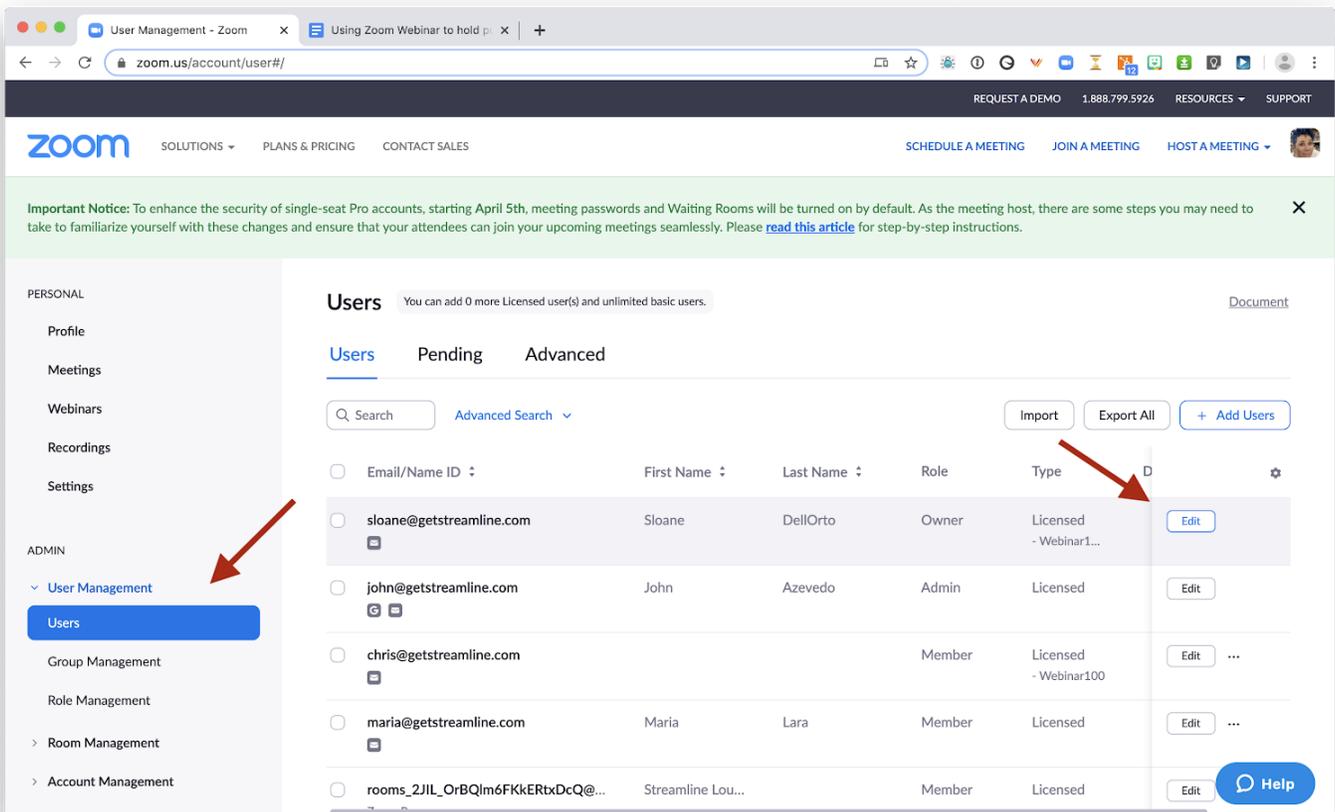
Log in at zoom.us and then click on **MY ACCOUNT**:



Left sidebar - click to expand **Account Management**, then click on **Billing**. Purchase one **Webinar** add on using the text link:

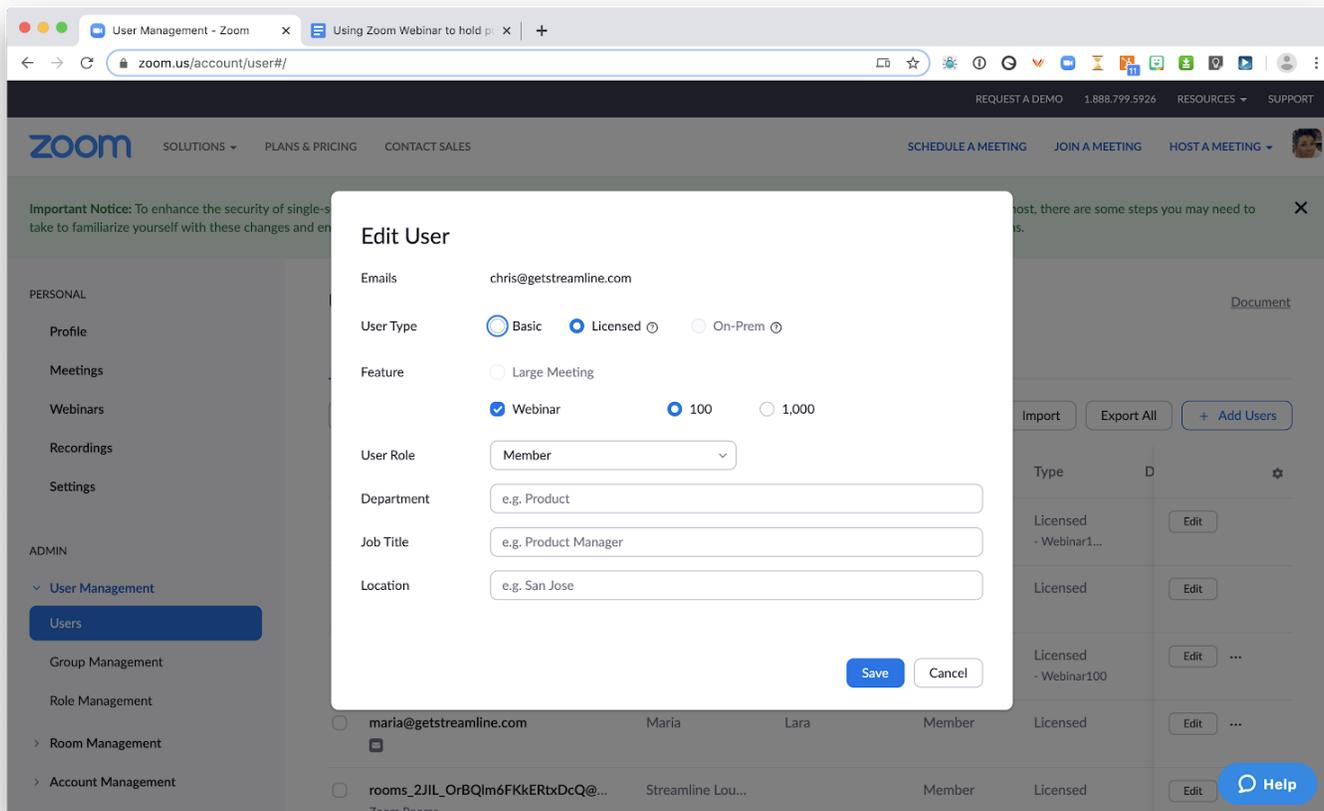


Next, click **User Management**, then **Users**, and edit the user account you want to add Webinar license to:



Add the Webinar feature, then click **Save**:

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You only need one **Webinar host** to make this work, although you can pay for more if you'd like. In fact, you only need a single Zoom account (Meeting + Webinar add-on) - you don't have to pay for any additional Zoom Meeting Pro users, or even set up your staff / board members as free Zoom Basic accounts, if you don't want to. There is one benefit to adding them as free, Zoom Basic users, though - if they aren't going to use video during meetings, they can add a profile picture so their pic shows when they speak (more on this later.)

Account settings to check / configure (optional)

Now on to a few settings you may want to configure. These are optional, but highly recommended!

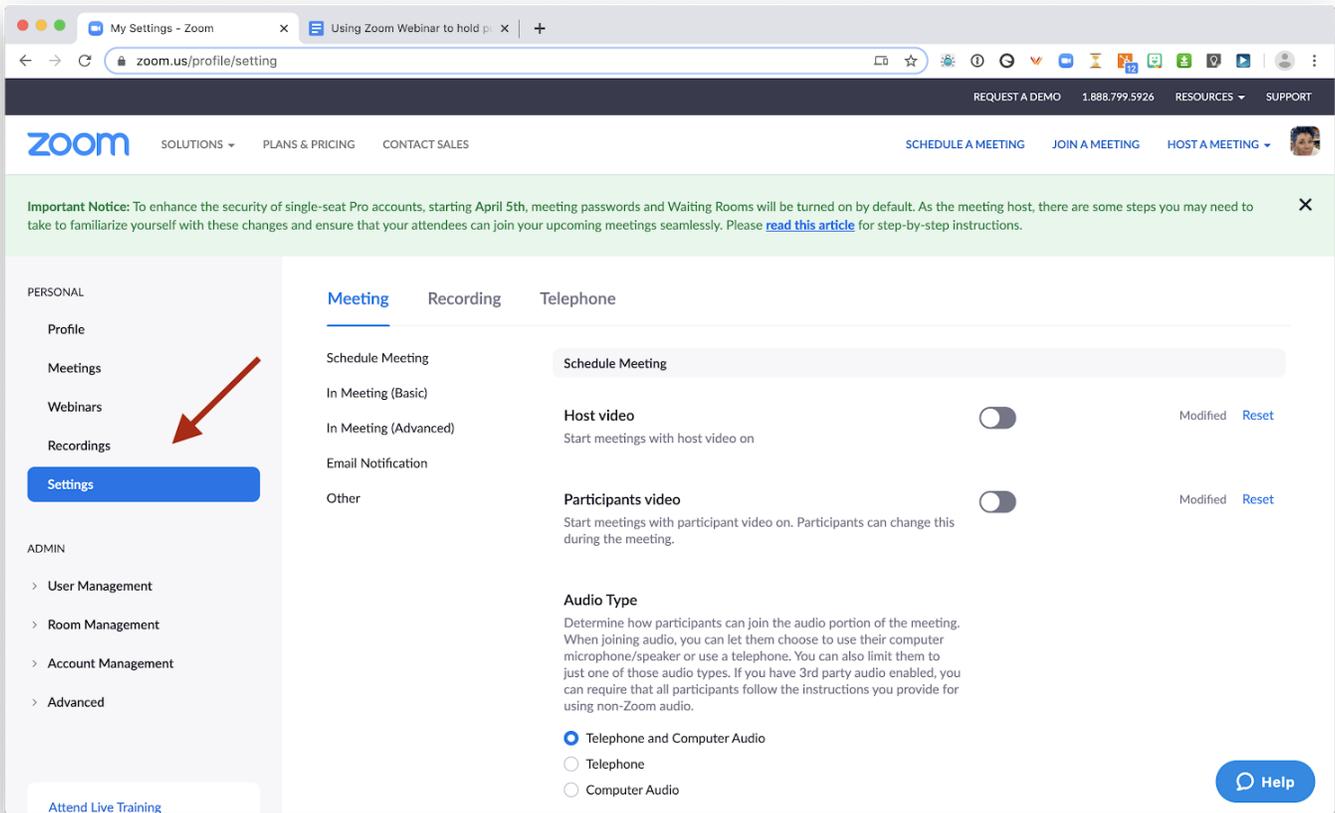
Disable Chat (maybe)

You might choose to keep Chat enabled so that you can use it to chat privately with your Panelists during the meeting. Also, note that if you disable Chat, it not only affects Zoom Webinars, but it won't be available for any of your Zoom Meetings, either.

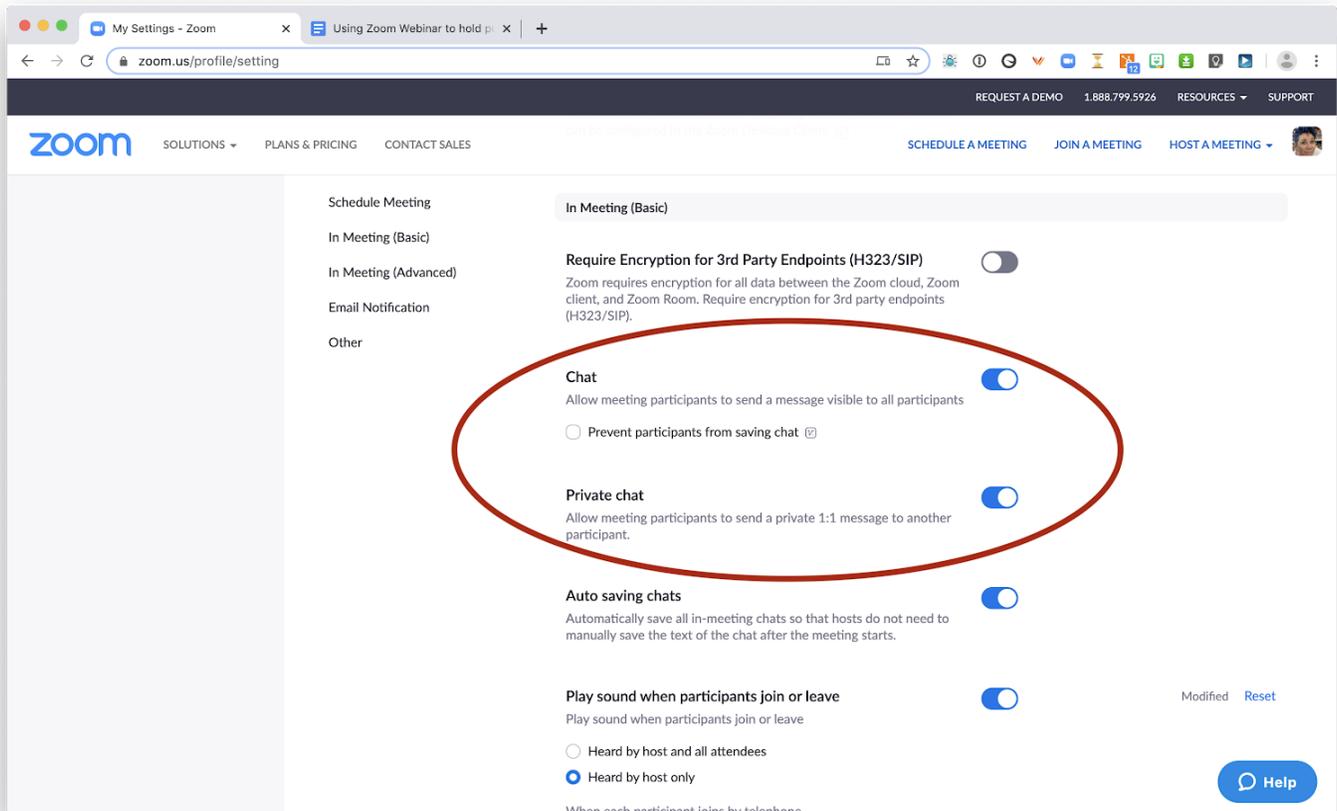
Zoom Webinar includes a Q&A feature that is much better for public meetings than Chat—at least, for managing public comment. If you don't disable Chat or [change the default settings](#), anyone on the Webinar can chat with anyone else (or everyone on the webinar!) Also, the chat window just keeps scrolling as more people add to it, so it becomes hard to track and you may miss public comments or questions.

The Q&A feature allows you to keep questions open until you answer them (more on this later).

If you want to disable Chat, go to **Settings** in the left sidebar, then scroll down until you find **Chat**.



Note that turning off the **first** Chat option will automatically disable the others.



Enable Closed Captioning

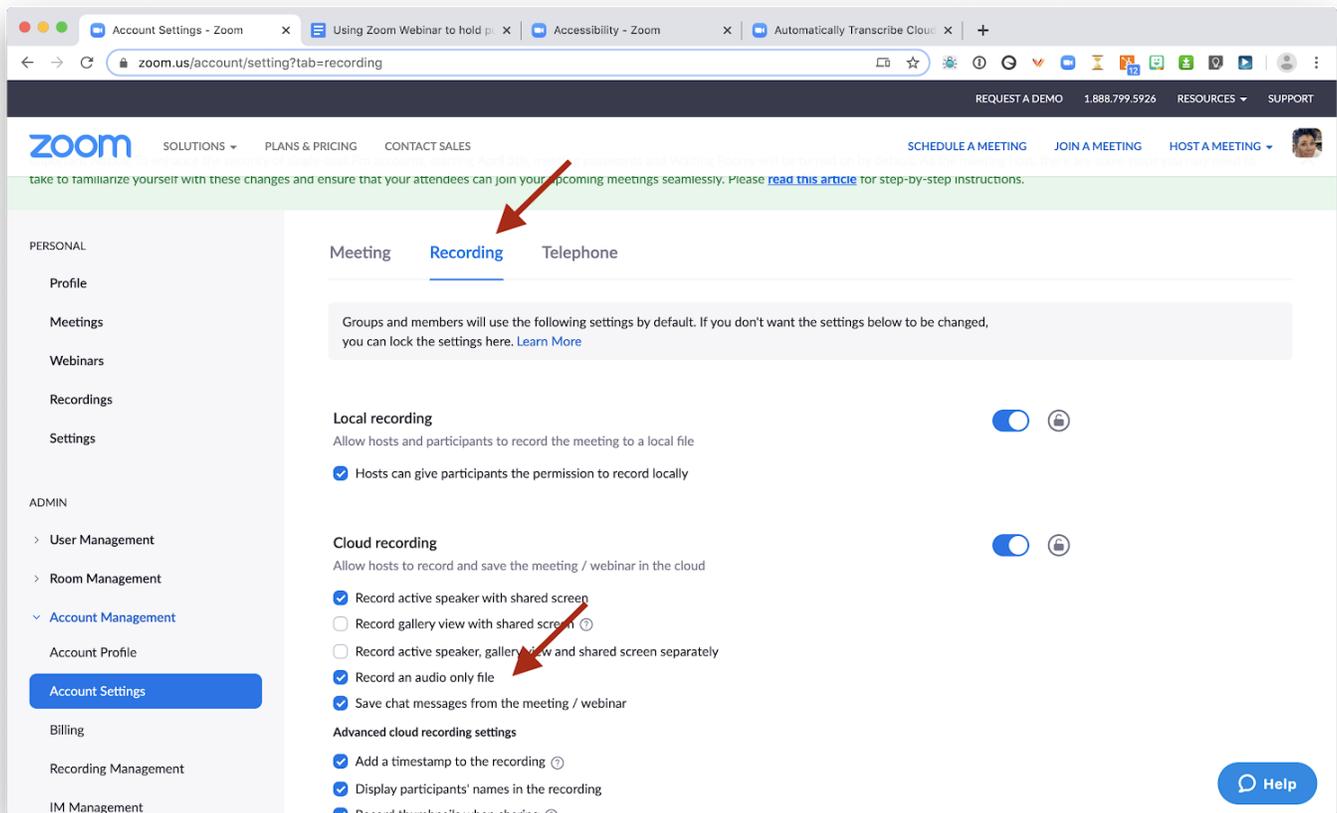
Scroll down a bit further until you find Closed Captioning, and turn it on if you'd like to enable this option. This allows you, or any Panelist, to type captions while the meeting is live. It's not automatic, though, and keeping up could be tough. If you decide to try this, assign your fastest typist, remind people to speak slowly, and ask them to pause when needed so you can catch up!

You might consider adding language to all of your meeting notifications, including at the top of each agenda, that you will provide accessibility help (like closed captioning) for those who request in advance. That way you aren't typing away like mad if it's not necessary! Transcripts are created automatically as long as you are recording to the cloud (not your computer) and have enabled "save separate audio file."

(We found a [great walk through of how to do this](#) on a college site.)

Save a separate audio file in addition to the video file

A separate audio file is not saved by default. To enable this, go to **Account Settings - Recordings** and check the box to save an Audio file:



This is a good idea and important if you want to share smaller files with anyone who simply wants to listen to the meeting, or if you need to save the file as your official meeting record.

We'll talk about where to find all these files (including the Transcript) in the **After the meeting** section.

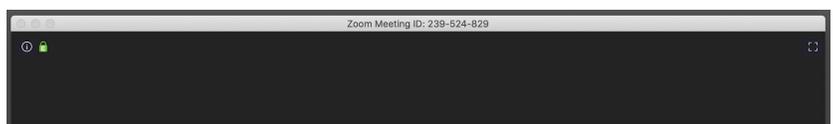
Believe it or not we're almost ready to set up our meeting (ahem, Webinar). But one last thing you may want to update: what people see when joining your Webinar.

Keep on keeping on! ↓

(...next page please)

What people will see when you speak

Using Zoom Webinar to hold public meetings



When people speak, Zoom shows either:

1. Their video, if it is on (only for the Host and Panelists - **Participants' video never shows** unless you enable each person individually)
2. Or, their Zoom profile photo, if they have a Zoom account (even a free Basic one)
3. Or, their name, if they have been invited as a Panelist and don't have a free Zoom Basic account with a profile photo and haven't enabled video.

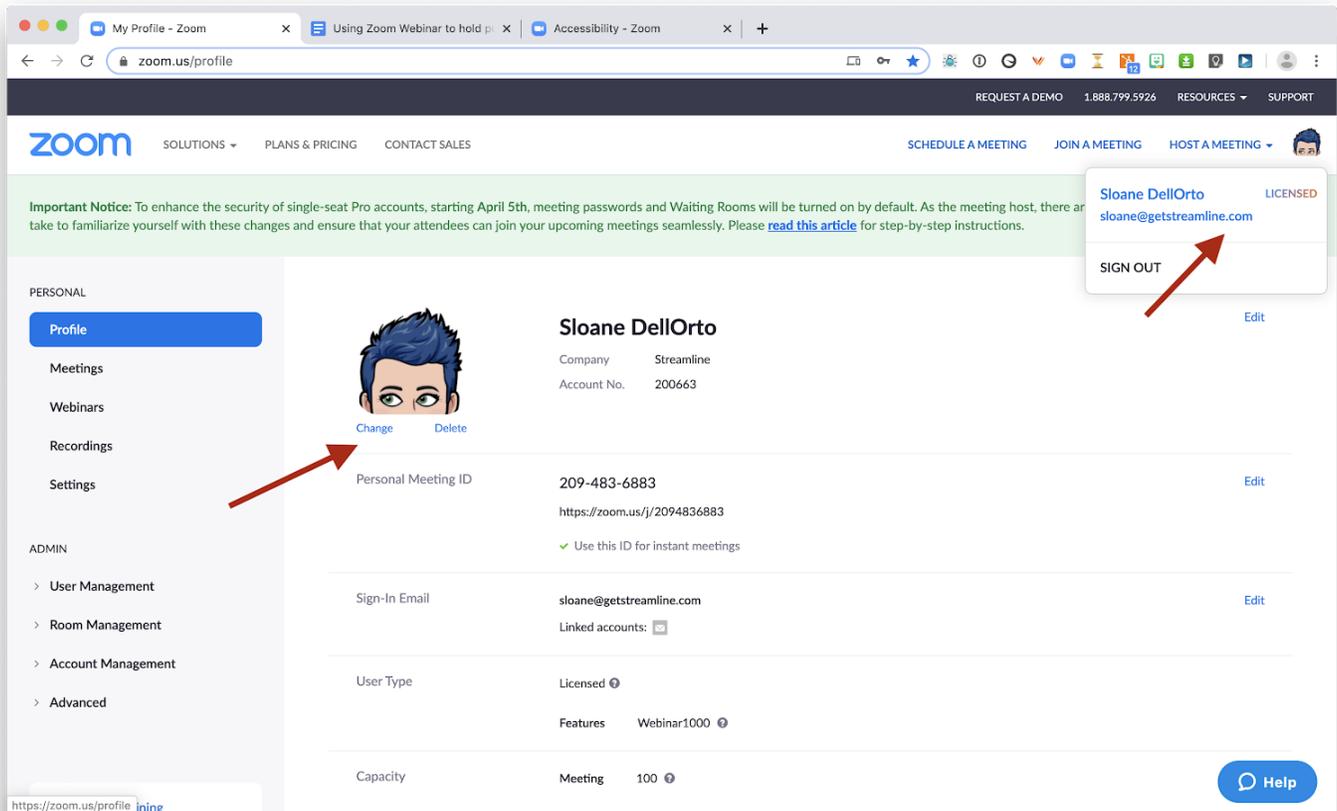
(If they have joined via phone, their phone number will show.)

I wish I had thought of this before grabbing all the screenshots for this post, I could have used our logo instead of this goofy pic! :))

How do you decide - video, photo, or logo? This really depends on how your organization plans to handle remote meetings. Here are my *personal* preferences, ranked by most to least favorite:

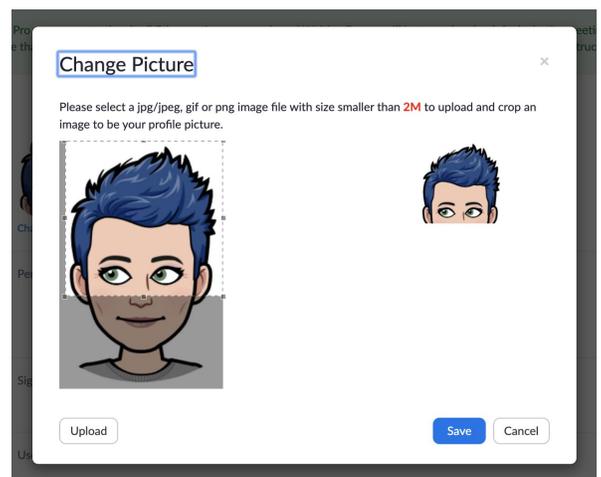
1. **Board and staff all enable video.** This allows you to see each other, and the public to see your faces, too. People tend to behave better when they see a person vs. some disembodied voice! It's also easier to run a meeting without interrupting one another when you can see everyone. (If you haven't already, check out the funny [conference call video on this landing page](#) - scroll down, bottom right.)
2. **Board and staff use photos.** If they don't want to be on camera, you can create a free Zoom Basic Meeting user account for each of your board / staff members. That way you can add a profile pic to each, and that will show when they speak.
3. **Or keep it simple – names only.** Nobody is on video or uses photos, you just have the one Host account and everyone else is invited as a Panelist. Their names show when they speak. If this is your method, it would be great to update your Webinar Host profile photo to use your agency logo.

To change or add a profile photo, click on the **Profile** link in the left sidebar—or, click on your **photo** (the person icon if you have no profile pic) in the upper right corner, then on **your name** right below that when it appears:



Then click the “Change” link right below your image and upload a new pic on the next screen:

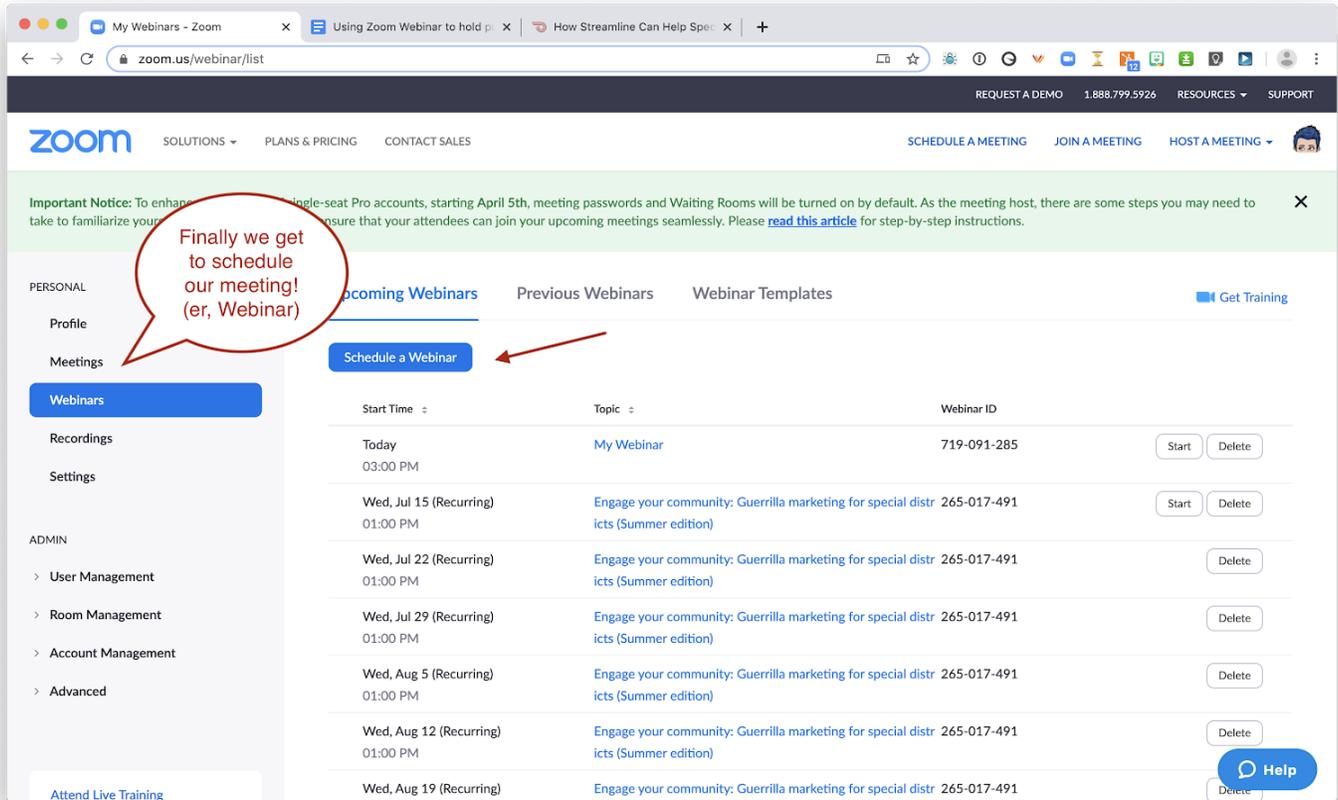
Note that it will crop to a square, so you may want to prep your logo or picture in advance. But it’s worth taking a few minutes to get a decent logo or image in place, as that is what will show *every time you speak* if your video is not enabled. (As you can see, my image hasn’t gotten less goofy - I look like a bandit with weird hair. :)))

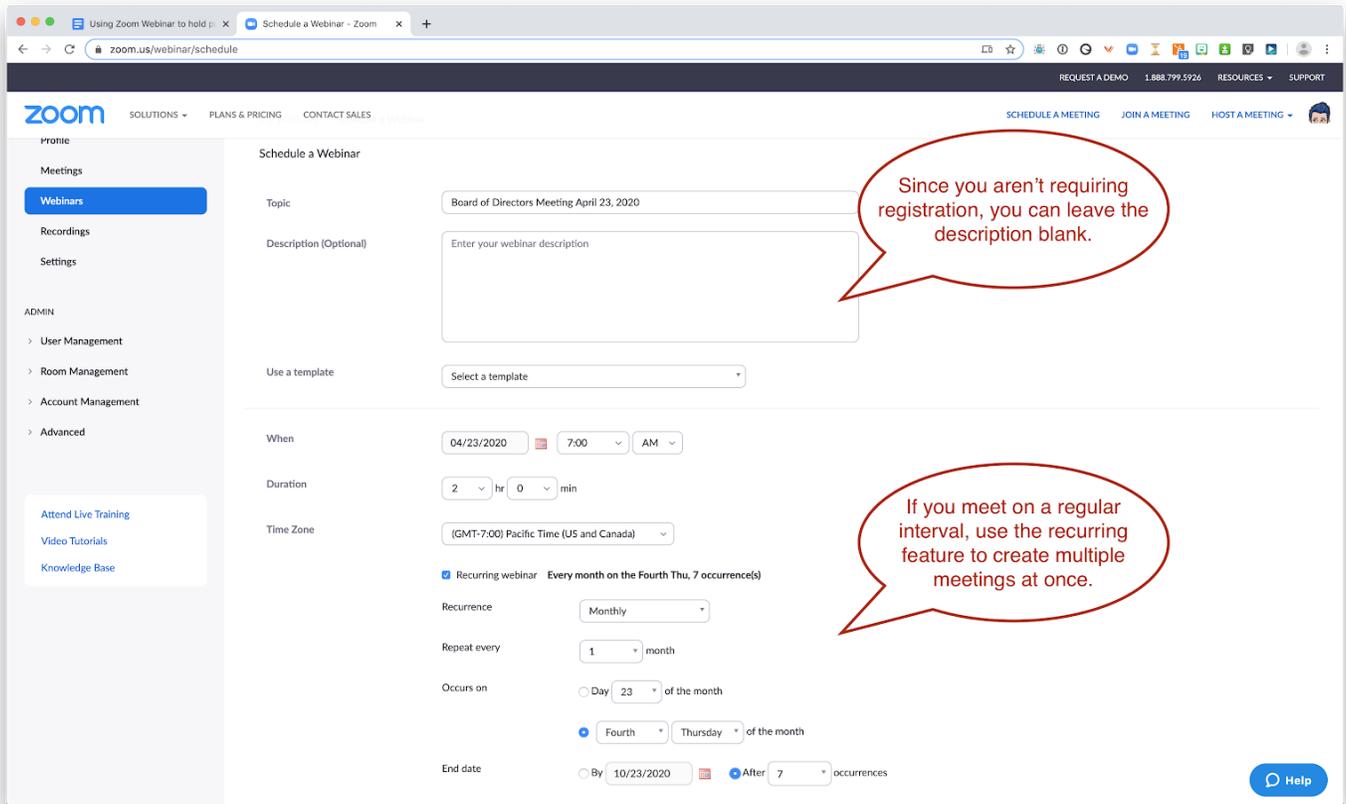


Whew! Now we’re done with configuration, let’s schedule our first meeting! (Er, our first **meeting** using the Zoom **Webinar** tools.)

Scheduling your meeting using Zoom Webinar (required)

On the left sidebar, click on **Webinars**, then click on the **Schedule a Webinar** button:

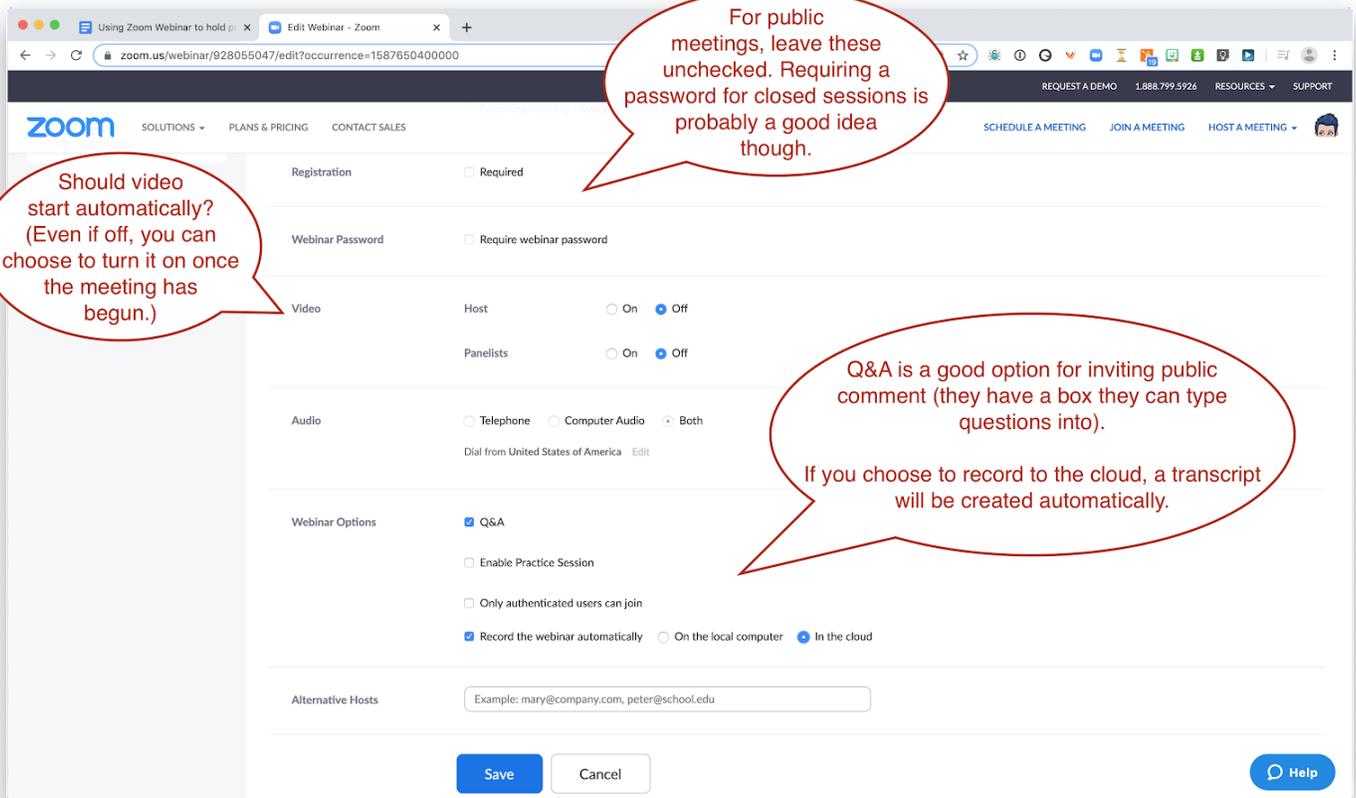




Important note: if you do use the recurring feature, do not put the meeting *date* in the title, as it will be added to every instance (e.g. your May meeting will also be called April 23, 2020).

You probably won't use the registration requirement for any of your meetings, but you may want to check "Require webinar password" for closed session meetings.

If you are going to hold a closed session, your best bet is to schedule it separately from the public meeting. That will make it easier for you to manage who is able to join by either sharing the password, or the separate meeting link with your board.



Click **Save**.

Now we just need to add our board members and staff as **Panelists** and send invites.

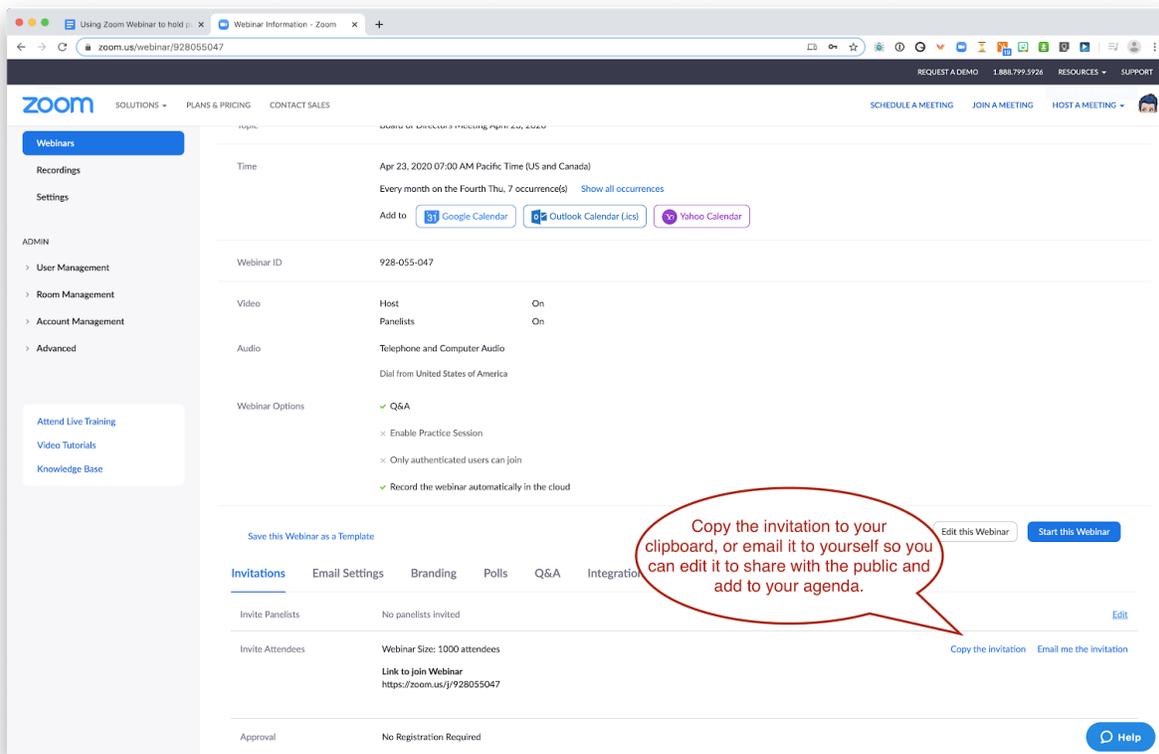
We suggest that you have one or two **Hosts** (the ones who do all the set up and start the webinars), and invite your staff and board members who need to participate in the meeting as Panelists. If you would like your staff and board members to be able to control their video, share their screen, and the like, the Panelist role is perfect for this. They do not need to have a Zoom account to be invited as a Panelist.

If your board members simply want to call in, you can skip this step.

If you have added your board as Panelists, they will get an email automatically:

Telling the public how to join and participate

To get the information you need to share with the public, go back to the main webinar screen, copy or email the invitation details:



What you get will look something like this:

You are invited to a Zoom webinar.
When: Apr 23, 2020 07:00 AM Pacific Time (US and Canada)
Please download and import the following iCalendar (.ics) files to your calendar system.
Monthly:
https://zoom.us/webinar/tJYld-ytrj8tr_7CZMGkqgUmEF5hZD086w/ics?icsToken=98tyKuCqjjsvH9SRt139a6otW5X5bPG5ImNx_YBn sTjuEidmbybQY-p4FuInRs-B
Topic: Board of Directors Meeting April 23, 2020

Please click the link below to join the webinar:
<https://zoom.us/j/928055047>

Or iPhone one-tap :
US: +16699006833,,928055047# or +13462487799,,928055047#
Or Telephone:
Dial(for higher quality, dial a number based on your current location):
US: +1 669 900 6833 or +1 346 248 7799 or +1 301 715 8592 or +1 312 626 6799 or +1 646 558 8656 or +1 253 215 8782
Webinar ID: 928 055 047
International numbers available: <https://zoom.us/u/abNJv752yV>

Which is really just too much information! We suggest editing it to provide more context and fewer call in options:

Our board meeting will be held remotely via Zoom. You can join on your computer and/or call in.

Screen share at <https://zoom.us/j/928055047>

If you are unable to join via computer, or do not have speakers or a microphone on your computer, you can dial in for audio. Call (669) 900-6833 or (646) 558-8656 and enter ID 928 055 047

Note that the public will be muted by default. If you would like to speak during the public comment portion of the meeting, you have the following options:

Online - raise your hand, or use the Q&A panel to submit your comments.

Phone - press *9 to raise your hand, *6 to send a request to be unmuted to submit comments.

Note: please replace with your own information before sharing!

If people are primarily used to finding your agendas in a physical location, be sure to share it in a variety of places online, too (website, social channels, etc). And of course continue to email it to anyone who has requested it.

Whew! Ok now we've got our meeting scheduled, our participants invited, and the public notified.

Before you click “Start the Webinar”

- Make sure your host computer has speakers and a microphone, or you have the dial in info handy,
- It is helpful to have two monitors. It’s not necessary, but it makes it easier to keep all the Zoom controls on one screen, and whatever you are going to share on another.
- **Practice!** Set up a practice webinar and hop on with your team to make sure everyone knows how to mute and unmute, turn on or off video, etc.
- For people who want to be on video but do not have a camera on their computer, it’s possible to download the Zoom app for a tablet or smartphone and join that way.
- Have a PDF version of your agenda packet open on the computer you will be using to host the meeting, if you intend to share your screen and have it viewable as you move through the agenda.
- Have a slide or document open and ready to share when you start the meeting. It should include information like the dial-in number and ID, and how you will invite public comment. Here’s an example:

Welcome to the Acme Municipal Utility District Board Meeting - April 23, 2020

This meeting is being held via Zoom and all attendees are muted by default. To join via computer, click the link on the meeting date and time: <https://zoom.us/j/928055047>

If you do not have speakers or a microphone on your computer, you can dial in for audio.

Call (669) 900-6833 or (646) 558-8656 and enter ID 928 055 047

If you would like to speak during the public comment portion of the meeting, you have the following options:

Online - raise your hand, or use the Q&A panel to submit written comments.

Phone - press *9 to raise your hand, *6 to send a request to be unmuted to submit verbal comments.

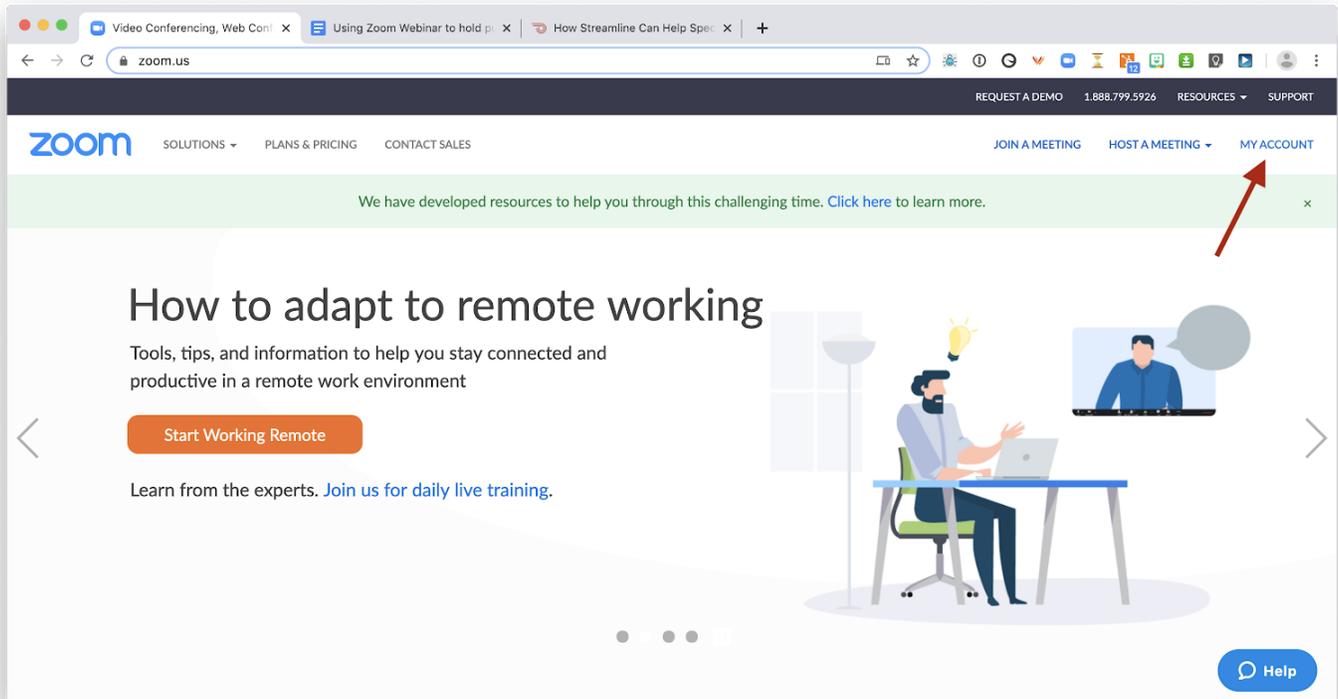
Public engagement is important to us, and meeting remotely is a new process. We appreciate everyone’s understanding as we figure this out together.

Note: make sure to replace this with your meeting link and dial-in numbers!

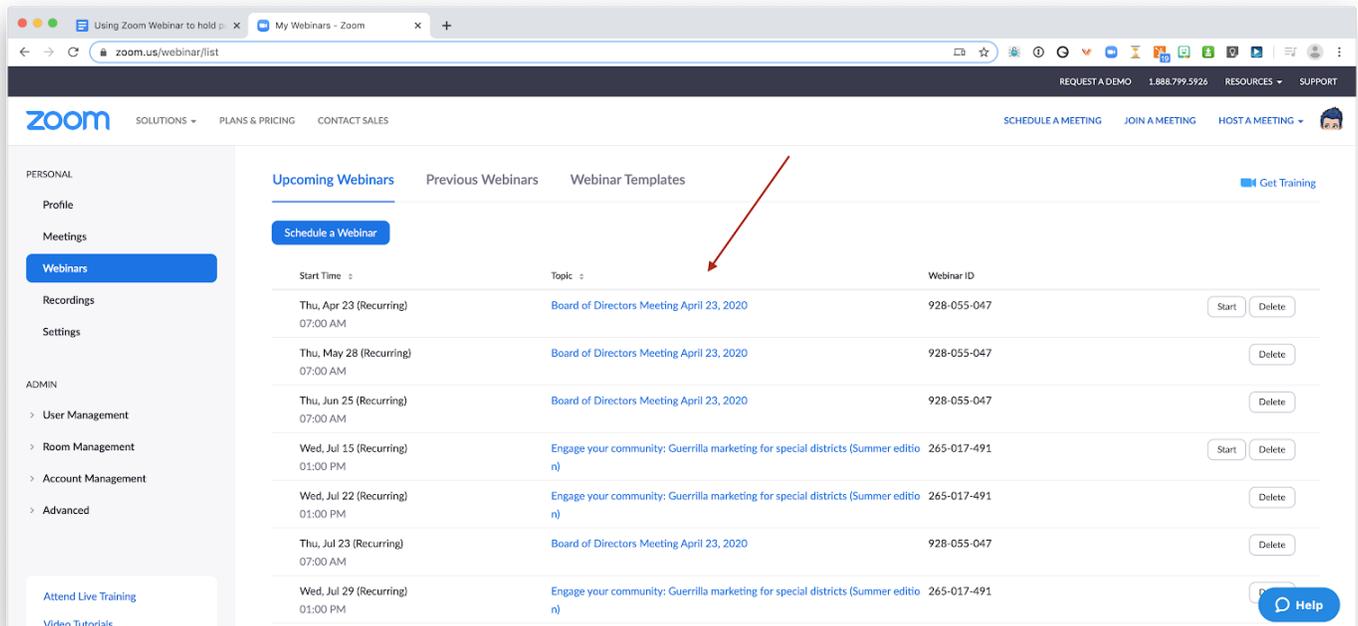
Running a public meeting using Webinar (required)

We suggest that you start your webinar early and ask all of your presenters to join a bit early, too. That way you can get settled in and feel prepared by the time people begin joining.

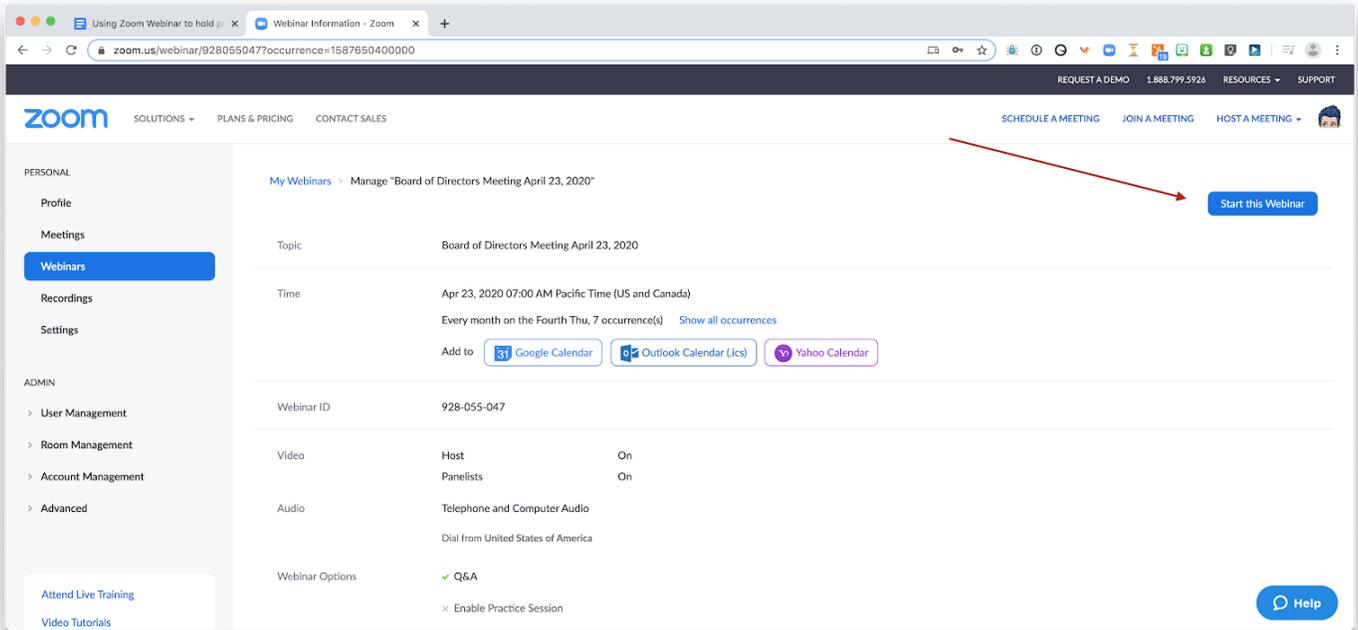
Go to zoom.us and log in to your account, or click on MY ACCOUNT if already signed in.



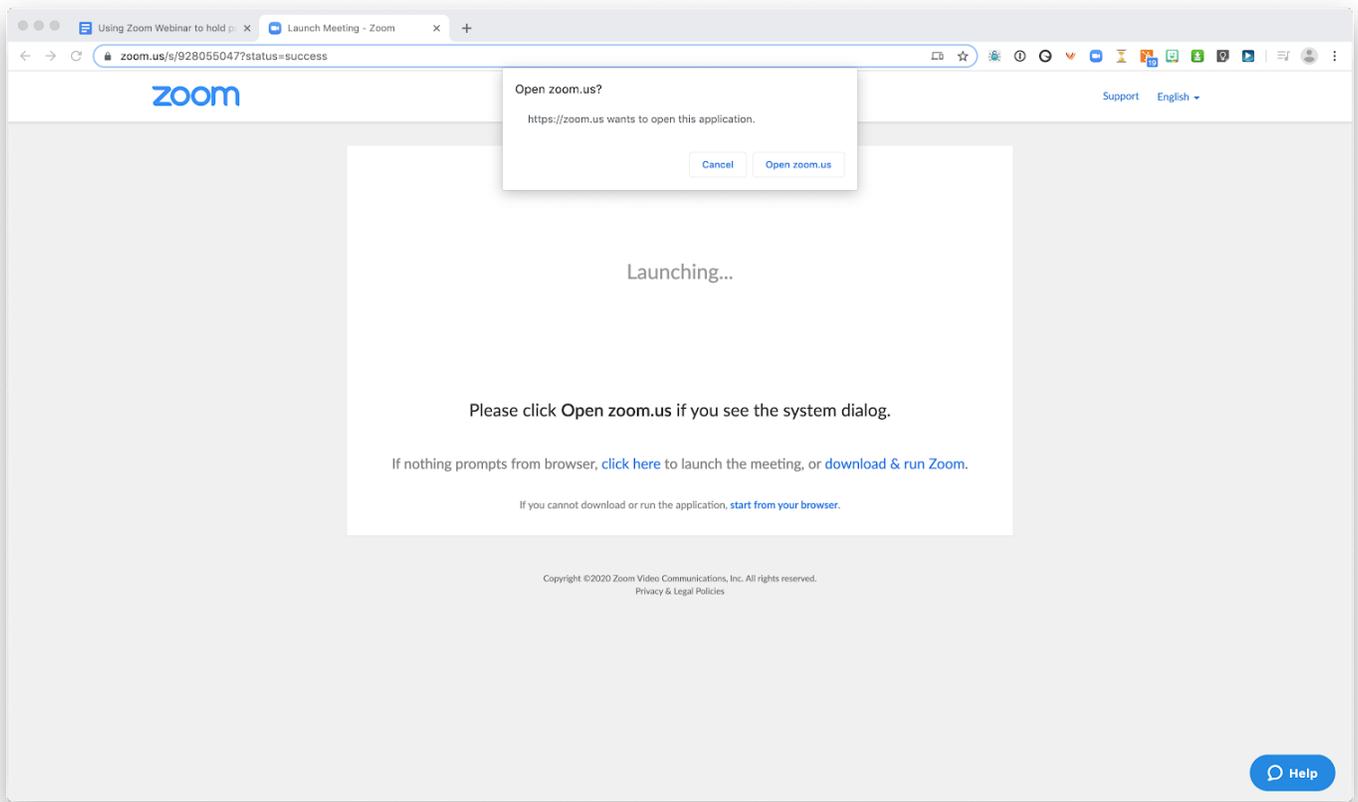
Click on Webinars on the left, then click on the meeting name:



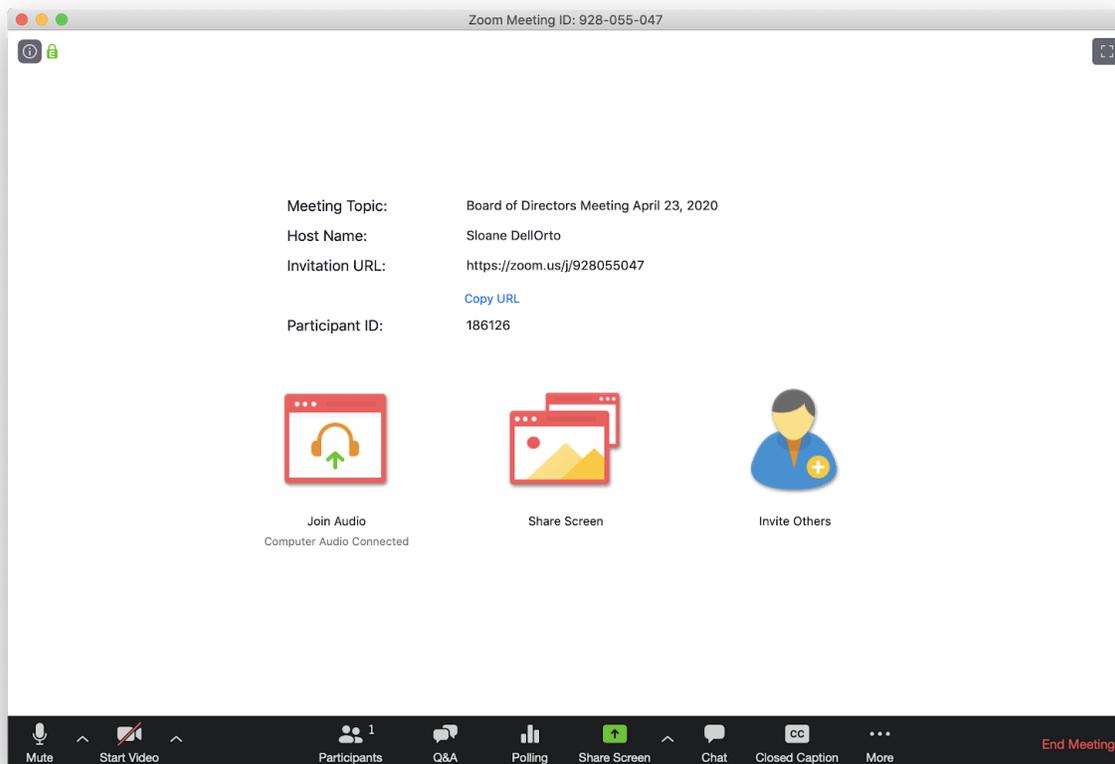
Click the button that says Start this Webinar:



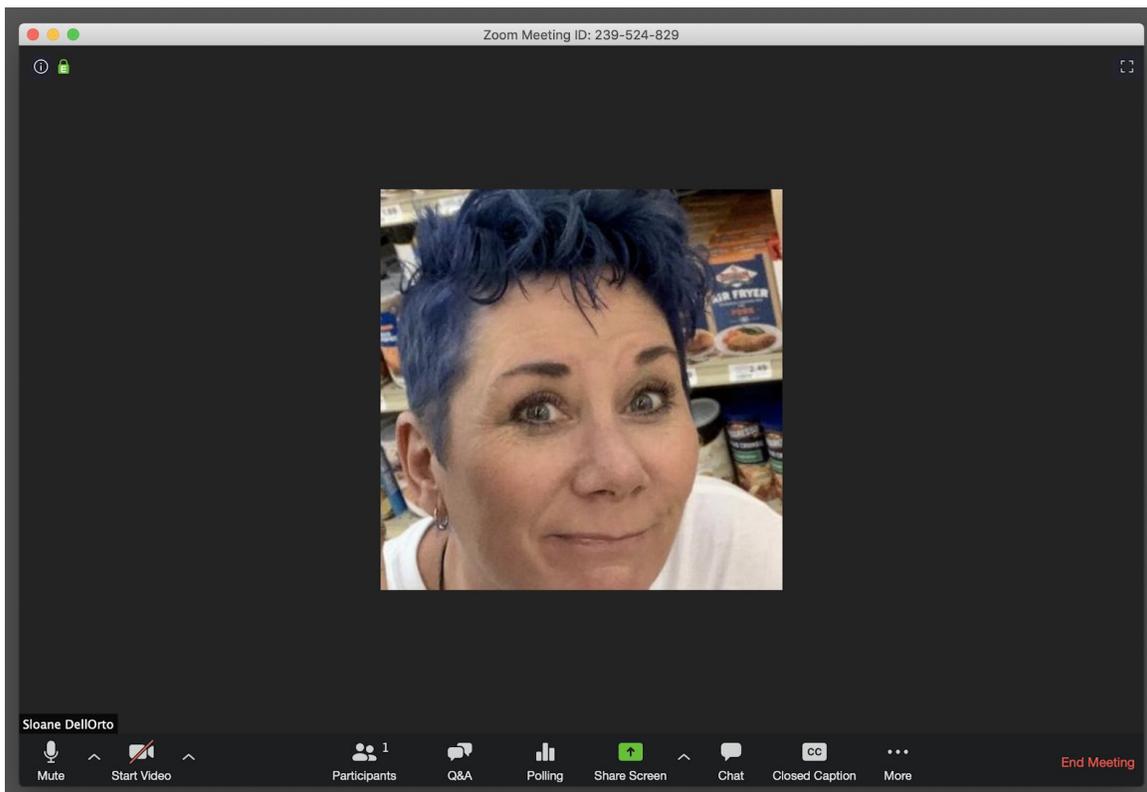
A message will pop up in your browser - **your webinar will not begin until you click "Open zoom.us:"**



The Zoom app will open (this is not the same as your browser!) Note: sometimes the Zoom app will not open and it will try to launch the meeting in your browser. This is not recommended. It is very important that you use the application, otherwise your meeting quality will be low. If your webinar was set up with video off by default, you will see this screen:



If you've set it up to start with video, you'll see something more like this (but with your face):

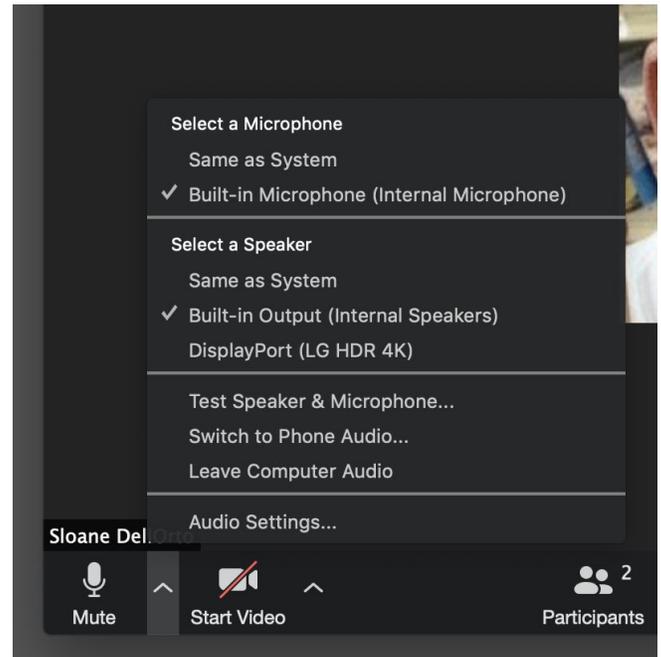


In the lower left, click Mute to turn off your microphone (if you have one) while you're getting everything set up and working.

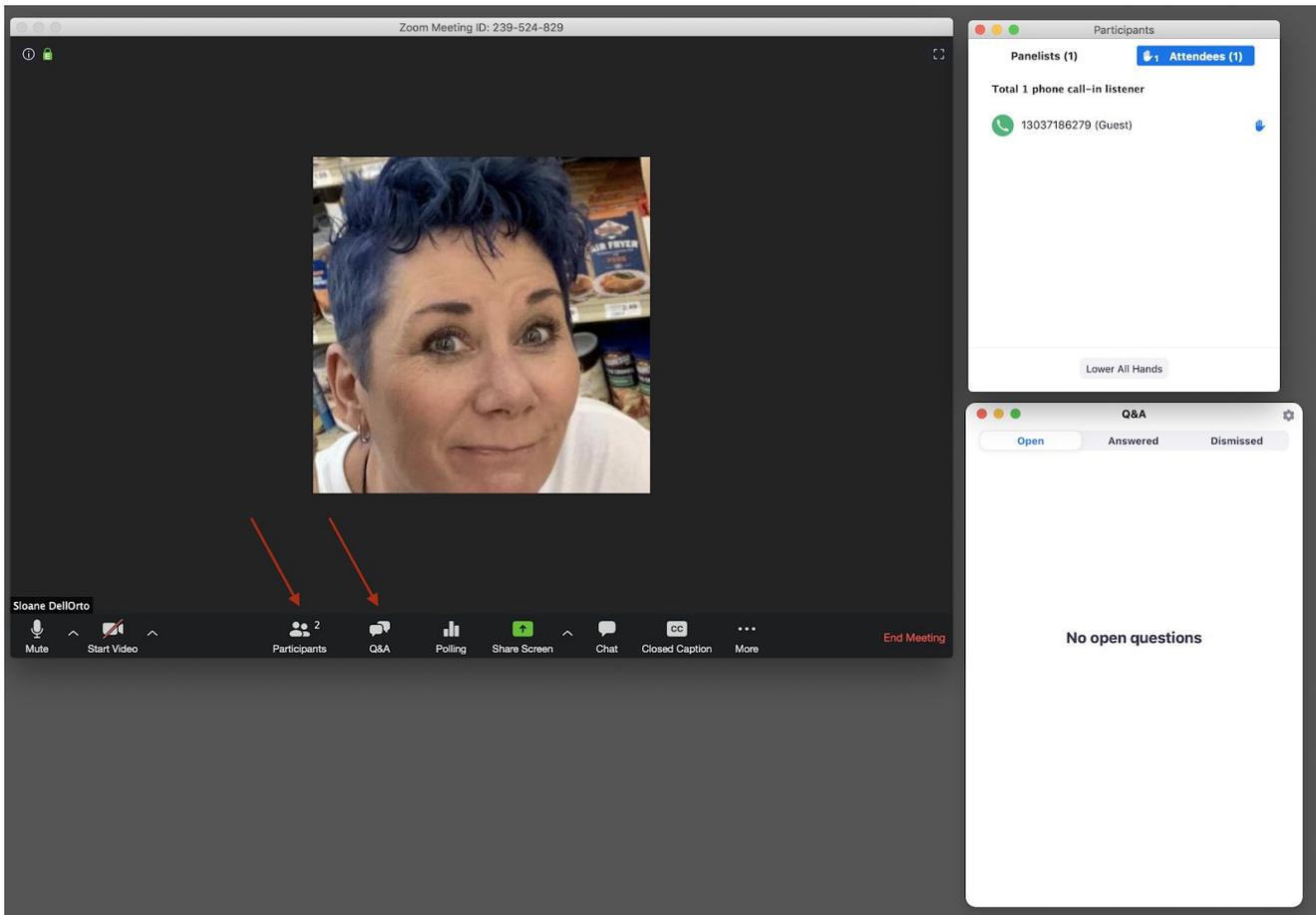
To check your audio settings, click the up arrow right next to the Mute button.

You can test your speaker and microphone (even while muted) to make sure it's all working properly.

As people start to join your meeting, it's a good idea to unmute a few times and let them know you'll get started shortly.



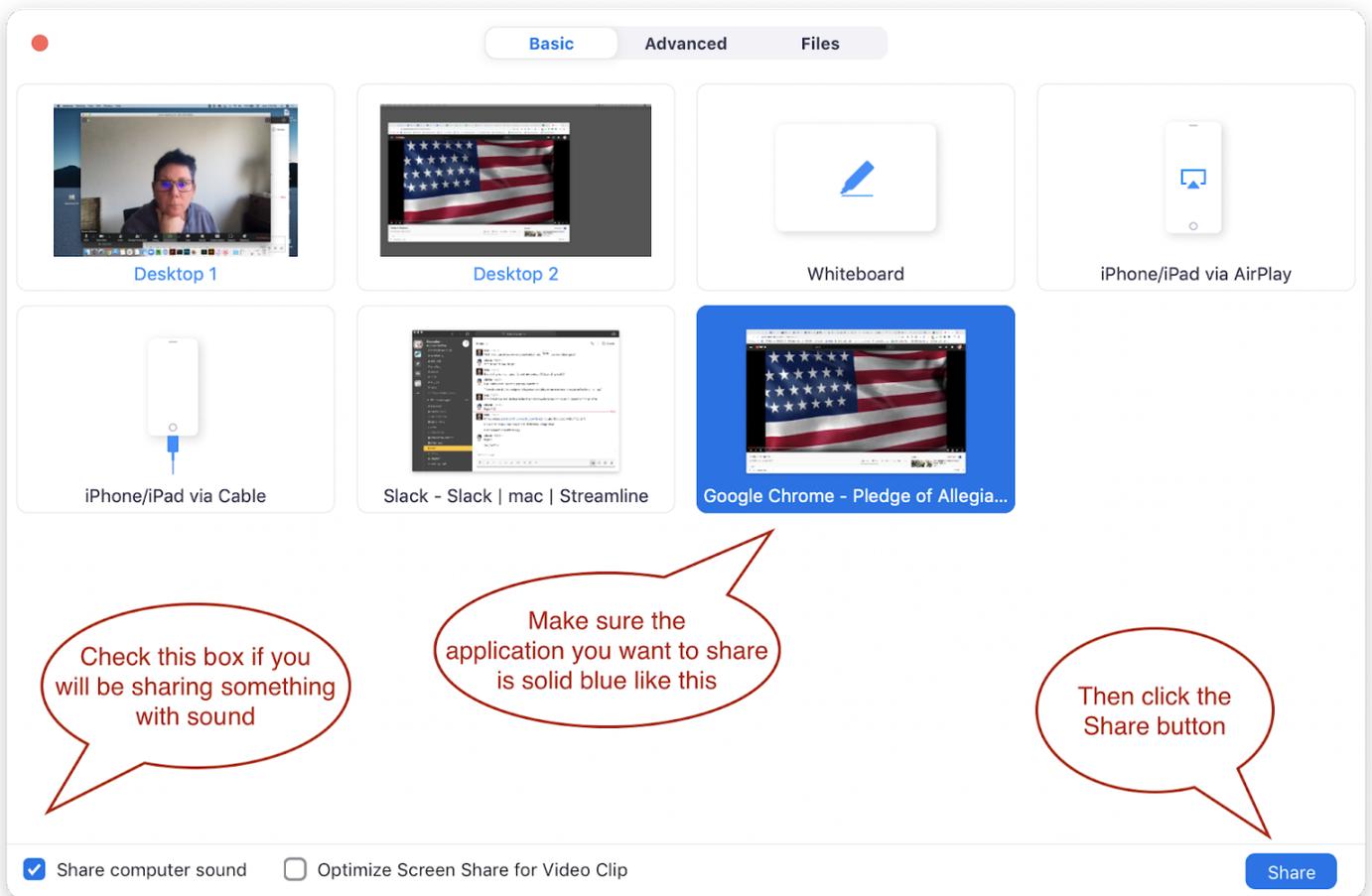
Next step: open the Participant and Q&A panes - you'll keep these open during the entire meeting. (Note that Panelists have these options, too.) On the Participant pane, you can switch between viewing the list of Panelists and Attendees - in our scenario, Board and Staff folks will be the Panelists, public members are Attendees. All Attendees will be muted.



The next step is to share the document you prepared to tell people how to participate (see page 18). Click the green **Share Screen** button in the Zoom toolbar. A screen will pop up that allows you to choose what screen, or file you want to share.

Important note: you probably do not want to share your entire desktop! You are much safer only sharing a browser window, or individual documents. This is why you want to open the agenda packet and other documents in advance.

Click on the document or application you want to display, then the blue Share button in the lower right.

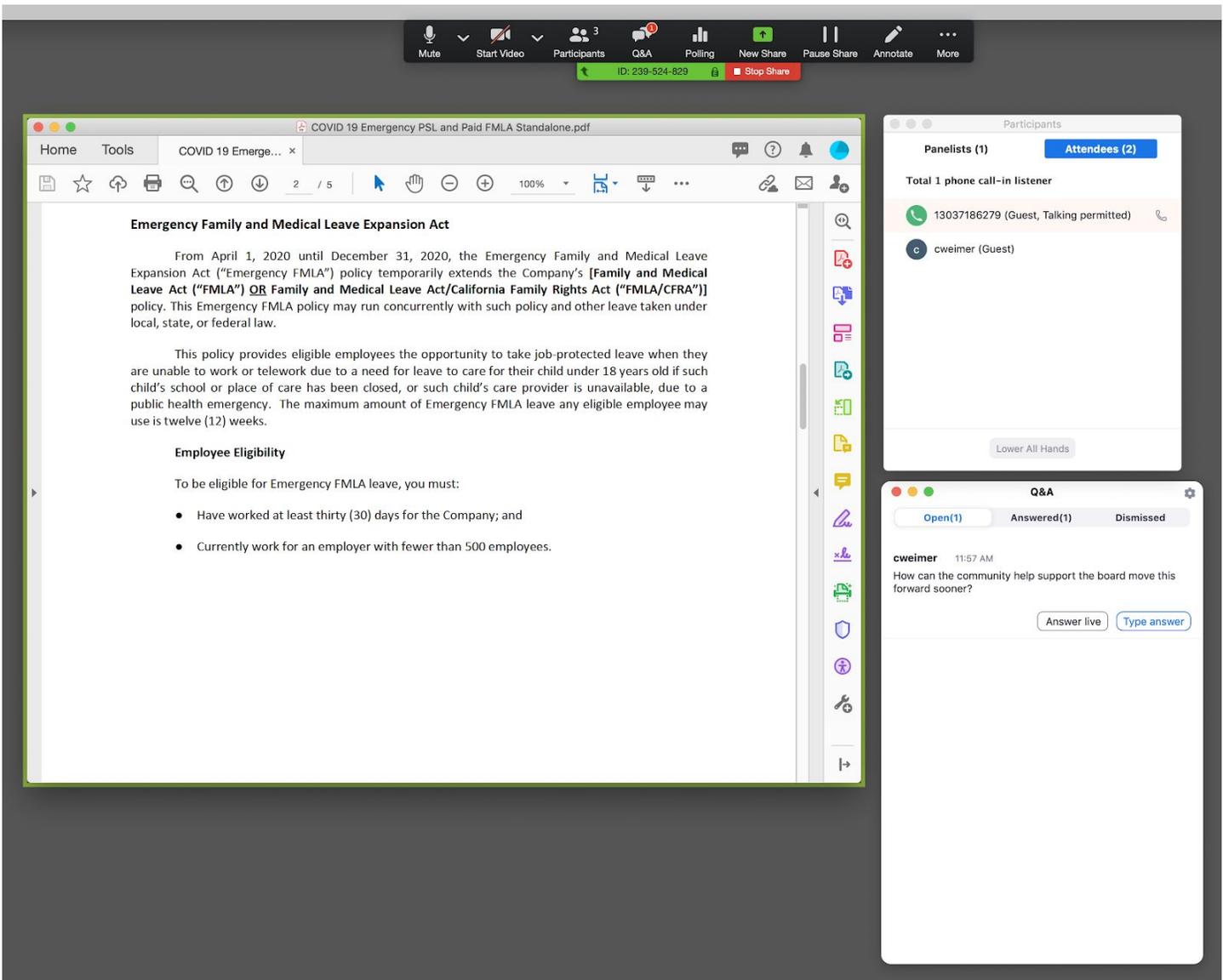


You will see a green box around the item you are sharing, and the toolbar will become smaller (and typically move to the top of your screen).

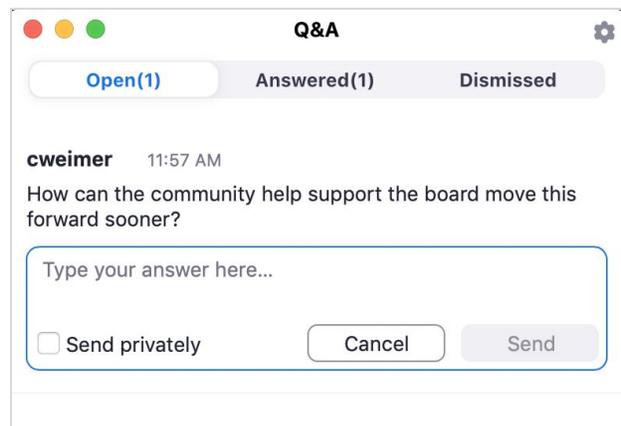
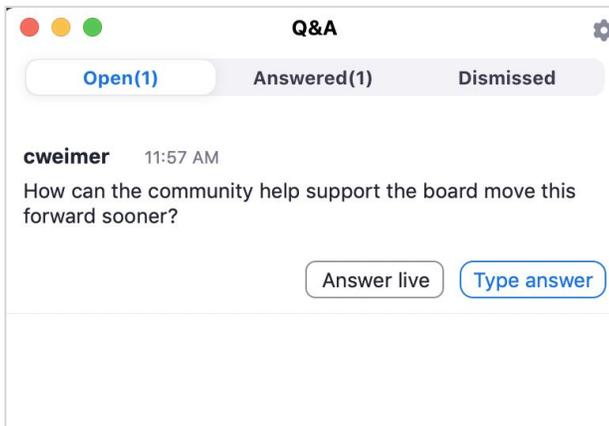
Note that the Q&A and Participant panes will remain persistent (and sometimes overlap your other screens) but Attendees cannot see them.

If you need to share a different file (for example, if you first share a document telling folks how to join audio and participate, then you want to share your agenda packet PDF), click on the "New Share" green button.

To stop sharing, click the red Stop Share button on the Zoom toolbar.



When questions come in, you can click *Answer live* or *Type answer* to reply. Note that if you type your answer and don't check "Send privately," everyone will see the question and your answer. (This can be helpful if someone asks how to dial in - you can share the information with everyone at once.)



Zoom Meeting ID: 551-492-328

Recording Paused

Talking: Sloane DellOrto

Meeting Topic: My Fantastic Webinar
Host Name: Sloane DellOrto
Invitation URL: <https://zoom.us/j/551492328>
Participant ID: 49...

Join Audio
Computer Audio Connected

Share Screen

Mute Start Video Participants Q&A Polling Share Screen Chat Closed Caption More End Meeting

Encourage the public to use the Q&A (and not Chat, if it is enabled) to submit questions so that you can keep track of them.

You can answer publicly or privately, via audio or by typing your answer.

Participants

Panelists (2) Attendees (2)

Total 1 phone call-in listener

- Chris Hefner (Guest, Talking permitted)
- 12094831001 (Guest, Talking permitted)

Lower All Hands

Q&A

Open(1) Answered Dismissed

Chris Hefner 03:55 PM
Is it okay to require a password on your webinar?

Type your answer here...

Send privately Cancel Send

Zoom Webinar Chat

From Me to Chris Hefner: (Privately)
Are you able to hear the meeting ok?

From Me to All panelists and attendees:
Checking to make sure everyone can hear?

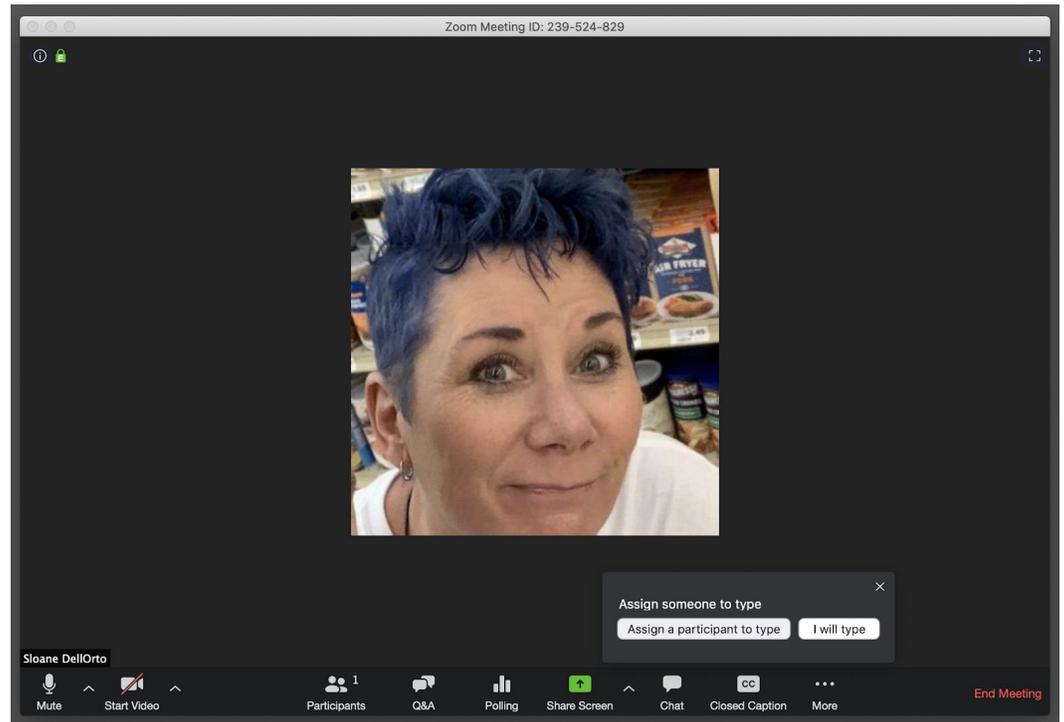
To: All panelists and attendees

Type message here...

Closed captions

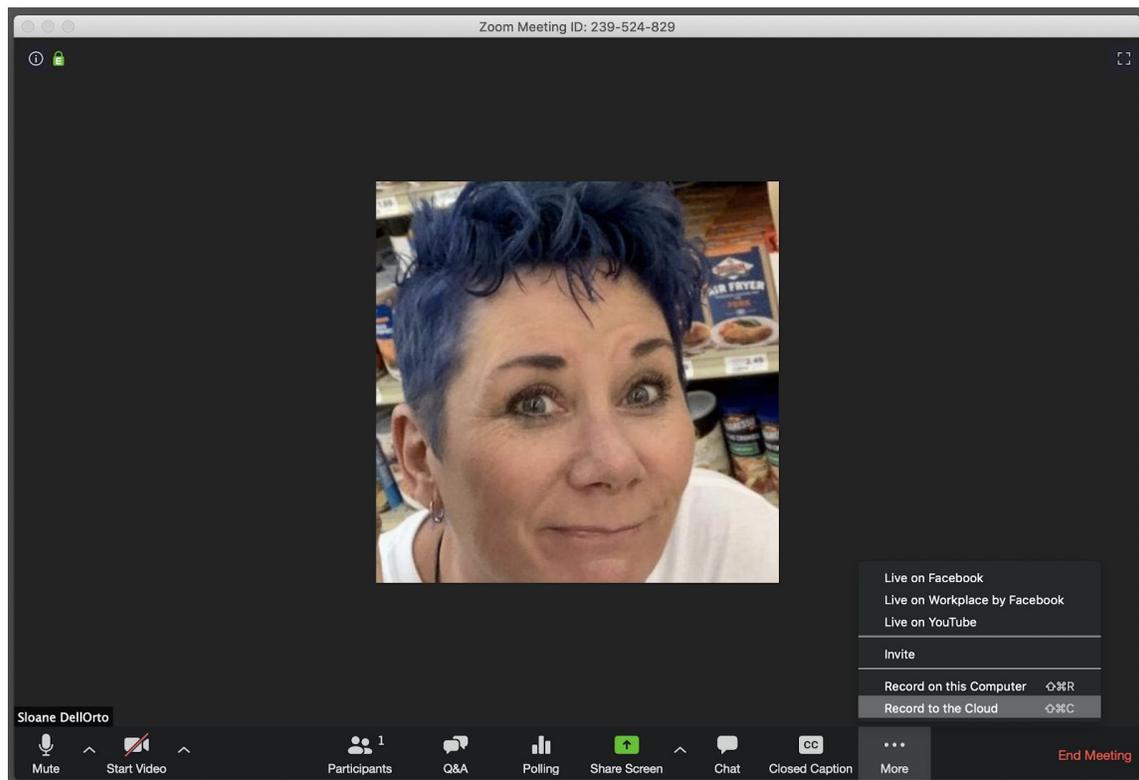
If you want someone to add closed captions as the meeting is in progress (for anyone watching who is hearing impaired) you can do so if you have enabled that (see prior info on setting up closed captioning, earlier in this document).

You can assign this task to another participant, or choose to do so yourself.



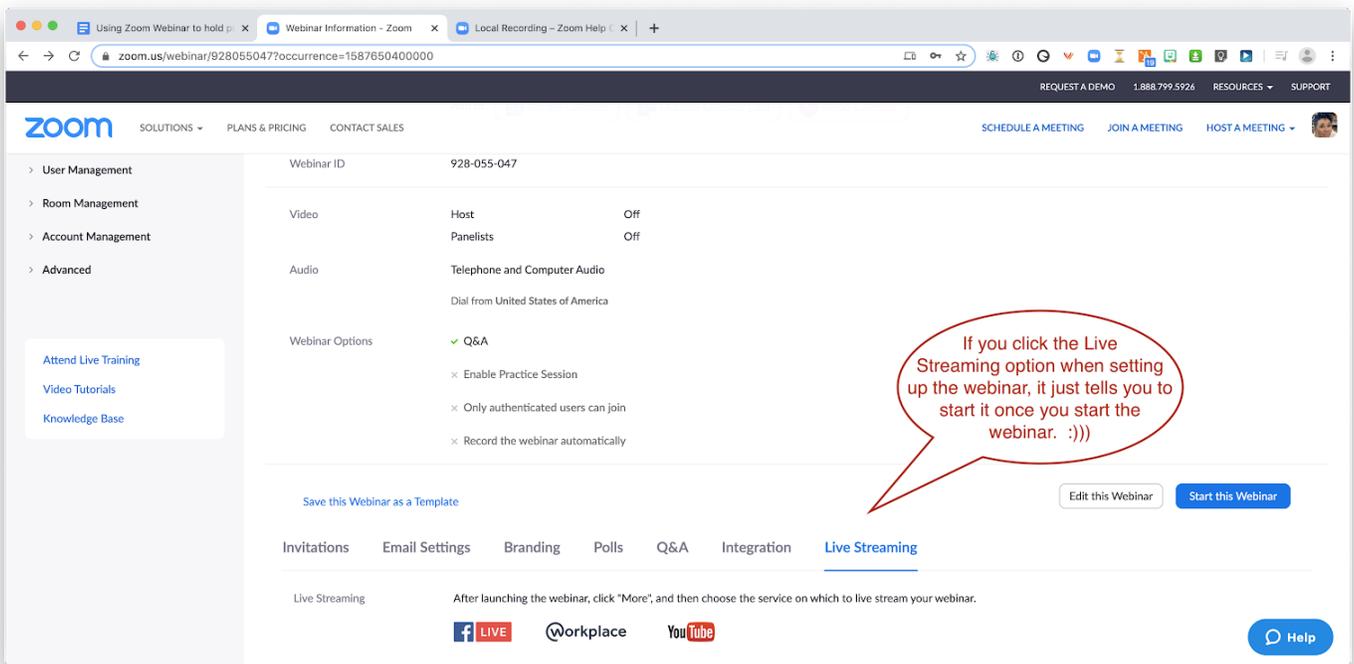
Starting the recording

If you didn't set the meeting up to record automatically, but you want to record your meeting when it starts, you can do so using the **More** button at the bottom of the screen (reminder, if you record to the cloud you'll get a transcript):

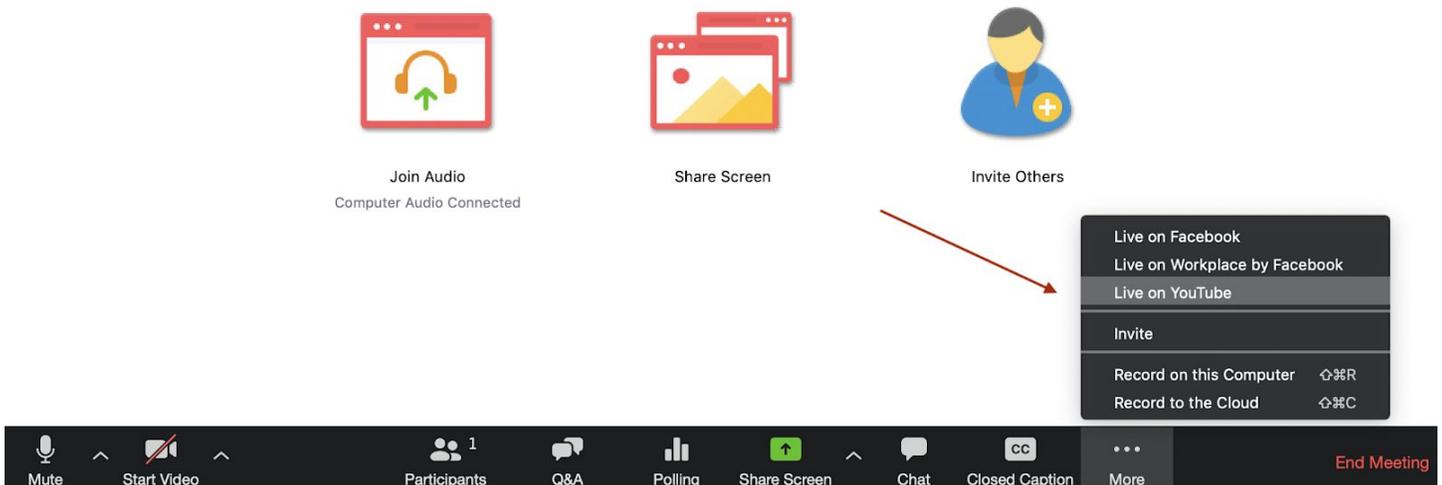


Live streaming your meeting

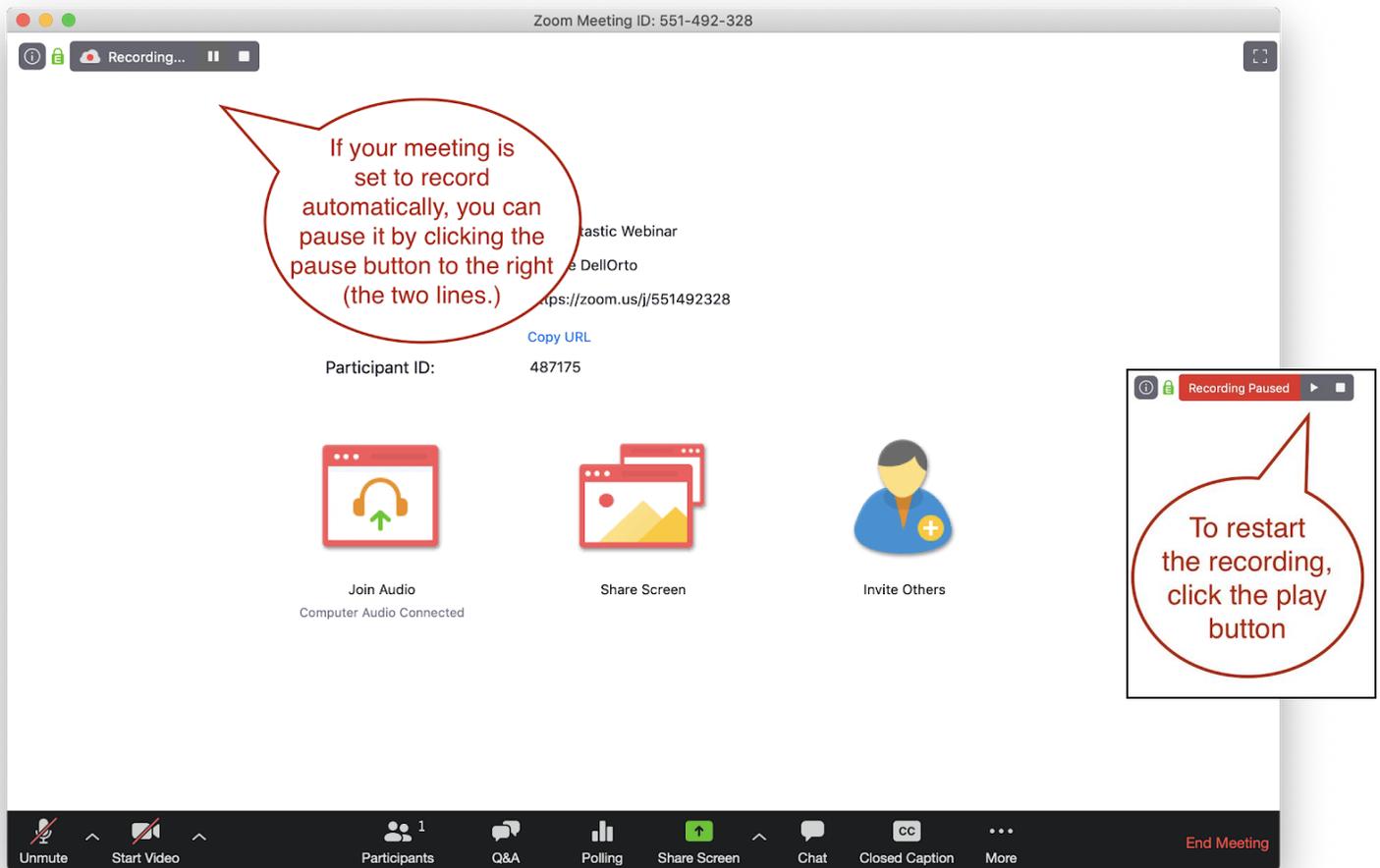
If you want to live stream your meeting, you might think it's something you would do when setting up the Webinar. But no. :))



During the meeting, click More and then you can choose to live stream:



Managing your workspace during the meeting (optional but important)

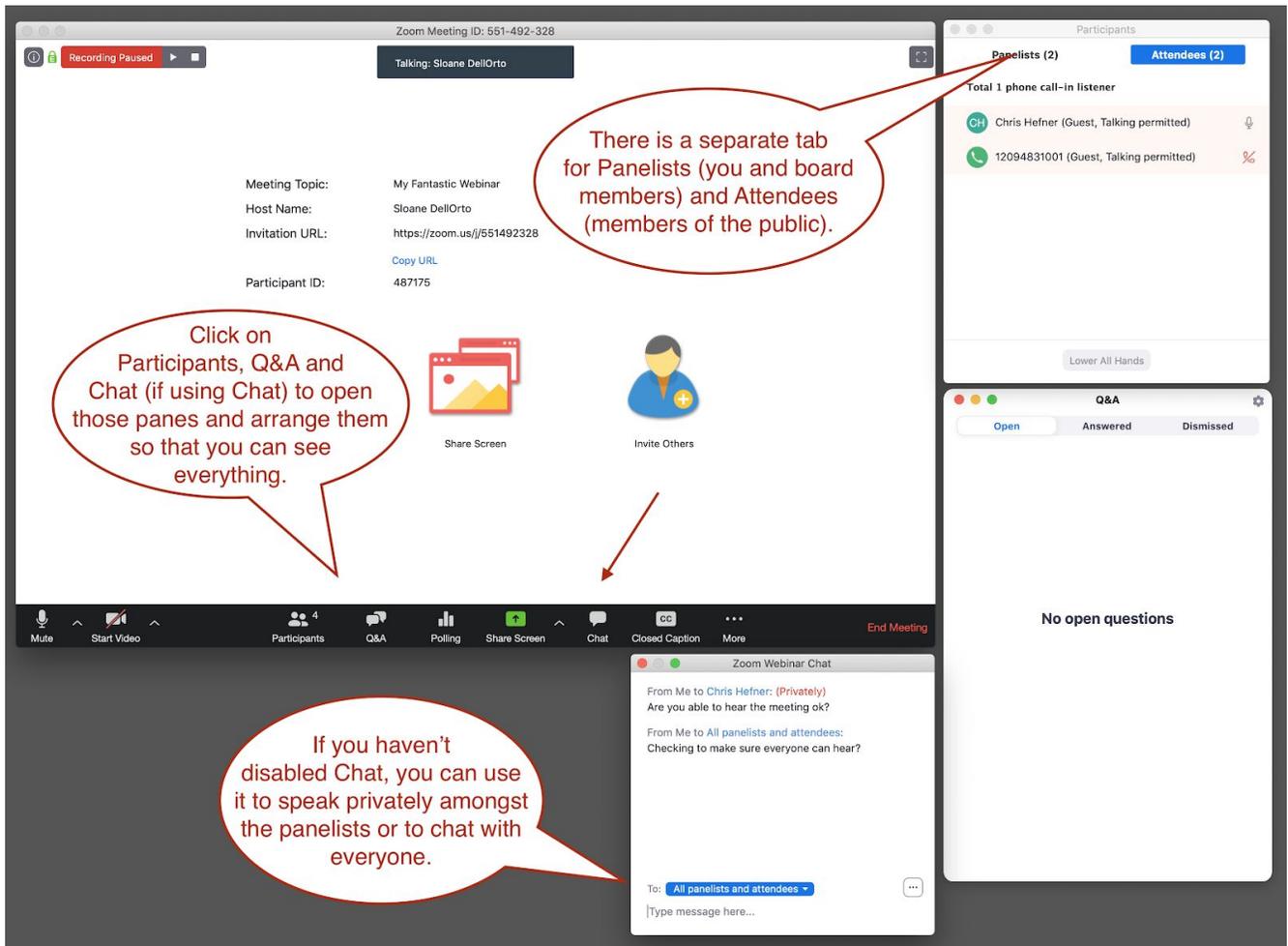


You likely want to mute yourself right away, until you're ready to actually start the meeting. To do so, click on the microphone icon lower left.

Hopefully you tested your mic and speakers before this, but if not - click the arrow next to the microphone icon and choose "test speaker and microphone." If they do not work, you'll need to call in to the meeting.

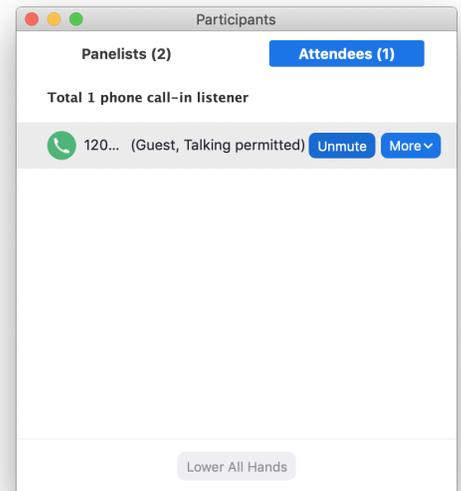
You want to get your workspace arranged so that you can find everything. At the bottom of your Zoom screen, click on Participants, Q&A, and Chat (if using Chat). Move each pane around until you have a layout that works for you.

To move the separate floating panes around your desktop, just click and hold on the top of each pane and drag them to a configuration that works for you:



If you want to allow a participant to speak aloud, you can ask them to press #9 on their phone or click the Raise Hand icon in Zoom to raise their hand.

Hover over the participant to see options, including Unmute.



Allow your Panelists to share their video

To allow your Panelists to share their videos, go to the Participant pane, click on the Panelists tab, then the More drop down.

Note that you can also change from Gallery to Active speaker view here.

Chris Hefner

Zoom Meeting ID: 551-492-328

Participants

Panelists (3) Attendees (1)

Sloane DellOrto (Host, me)

More

- Mute Participants on Entry
- ✓ Allow Participants to Unmute Themselves
- ✓ Play Enter/Exit Chime
- ✓ Allow Participants to Rename Themselves
- Lock Webinar
- Allow Panelist Start Video**
- Lower All Hands
- Allow Attendees to:
- ✓ Raise Hand
- View the participant count
- Attendee Video Layout:
- Follow Host's View
- Active speaker view
- ✓ Gallery view
- Merge to Meeting Window

Zoom Webinar Chat

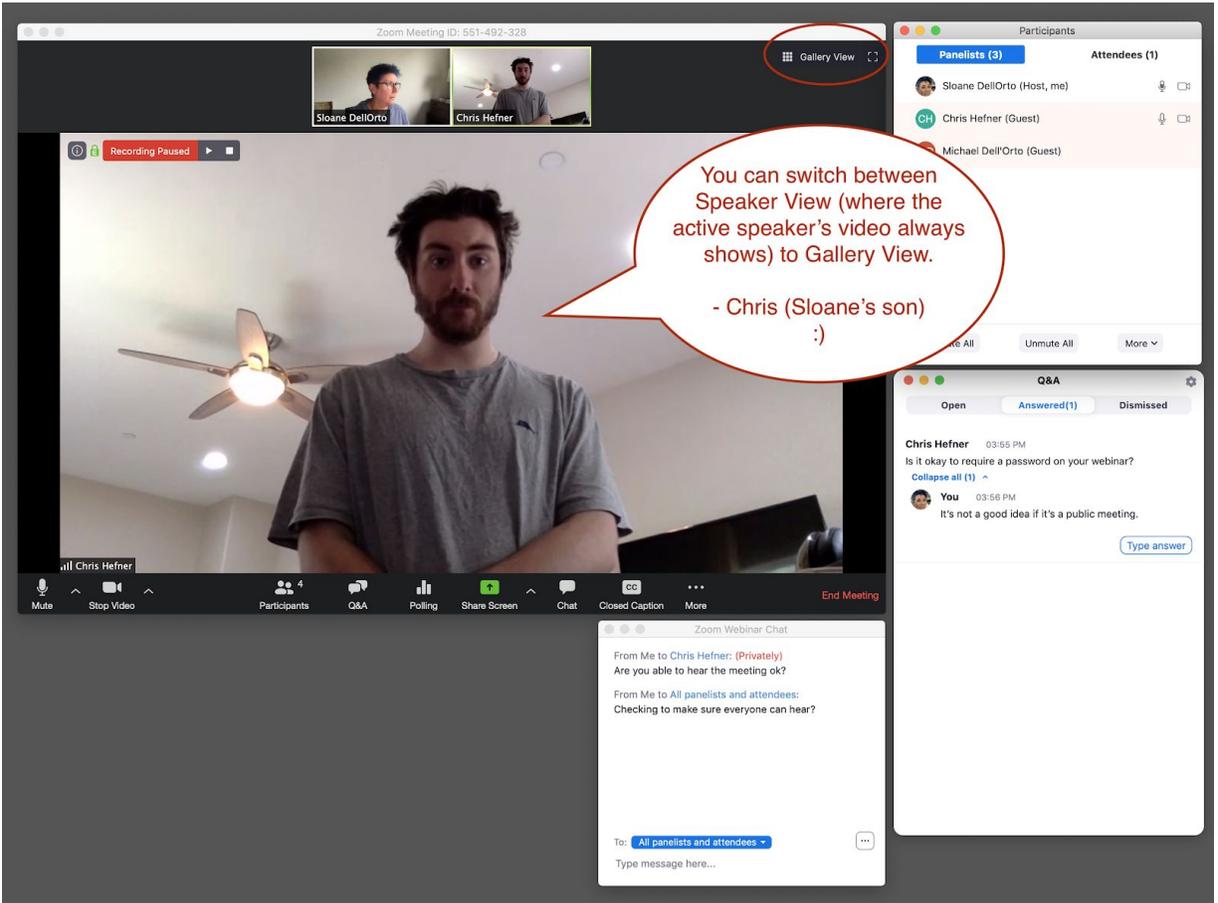
From Me to Chris Hefner: (Privately)
Are you able to hear the meeting ok?

From Me to All panelists and attendees:
Checking to make sure everyone can hear?

To: All panelists and attendees

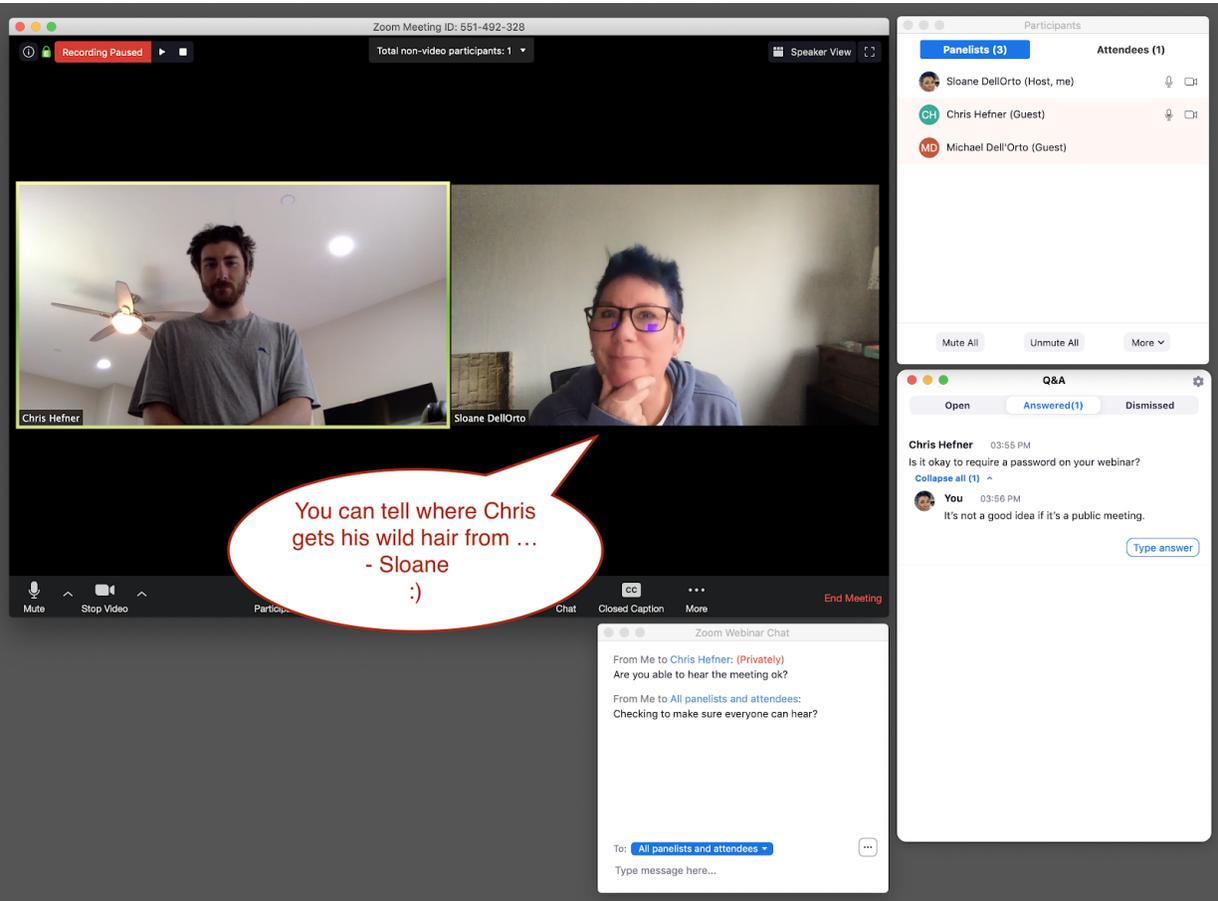
Type message here...

For this example, I invited my son Chris to be a Panelist on my pretend webinar to grab some screen shots. :)



You can switch between Speaker View (where the active speaker's video always shows) to Gallery View.

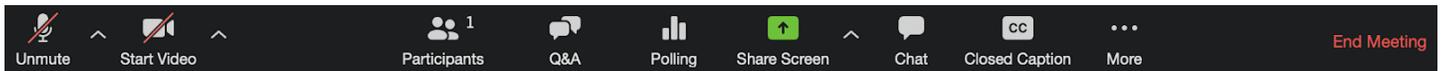
- Chris (Sloane's son) :)



You can tell where Chris gets his wild hair from ... - Sloane :)

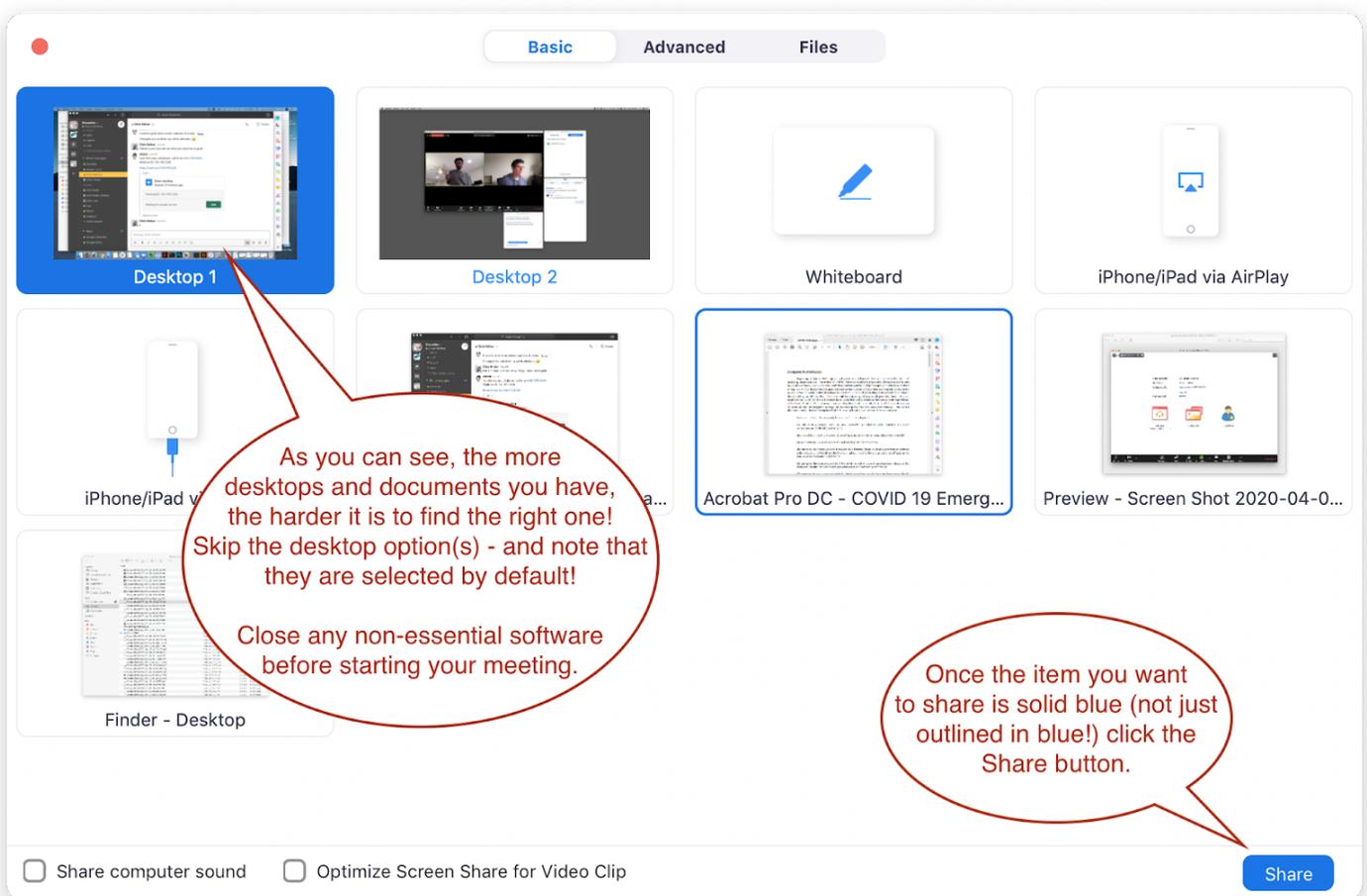
Sharing a document

If you want to share your agenda packet during the meeting click on the green **Share Screen** button. (If you were already sharing something, the button will say “Share New” instead of Share Screen.)



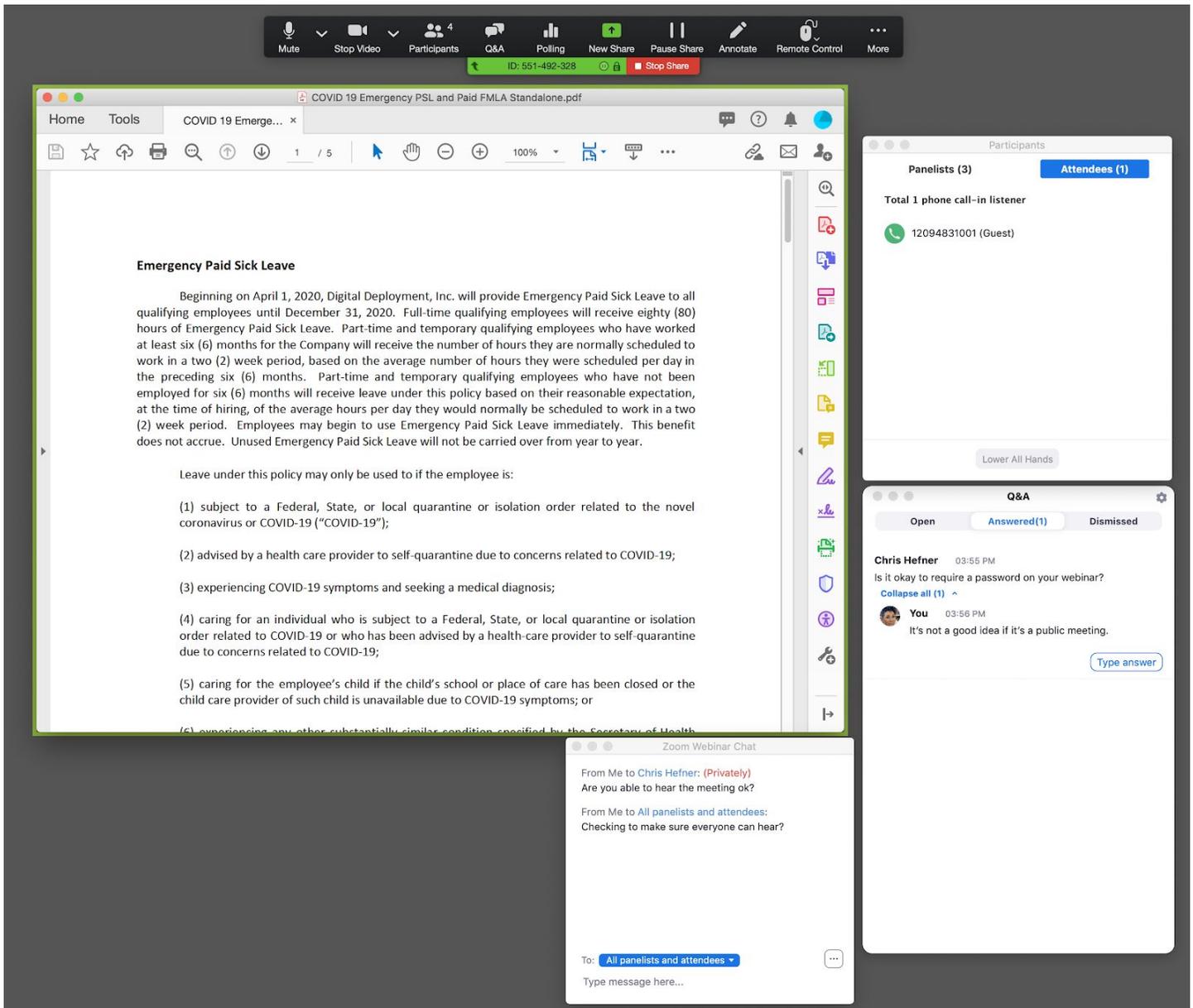
Another window will open that gives you a bunch of choices for what to share. We strongly suggest that you open the documents you want to share **before you start the meeting**. Whenever possible, sharing individual documents will ensure you don’t accidentally share something you shouldn’t (like your inbox!)

Your Desktop will be selected by default, so make sure to click on what you want to share and double check that it turns solid blue! If you are going to share your entire Desktop, then close non-essential applications and files before you begin.



It can get a bit confusing at this point, because the Zoom toolbar switches from the bottom of the tool interface to a floating bar that can be moved around (it usually appears at the top of your screen).

The same thing will happen with videos, if they are enabled. They become smaller and floating, and you can move them around your desktop to keep them in view.



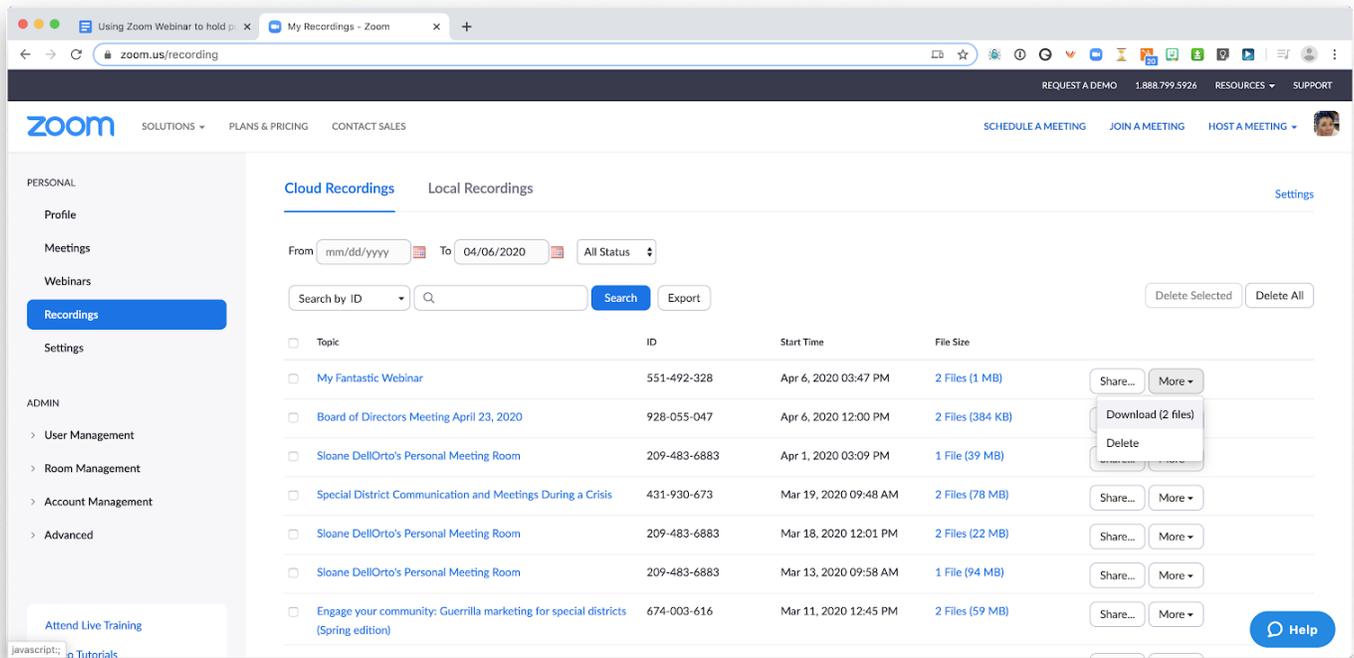
Tips for holding a closed session (optional)

A few tips for closed sessions:

1. Schedule a separate meeting (or Webinar) with a unique link, and possibly a password. Hold it before or after your public meeting, as you won't be able to have them both running at the same time (you can't switch between two sessions hosted by the same Host).
2. You could also simply use a different platform for your closed sessions - like freeconferencecall.com and only share the call in number with your board and staff.

After the meeting (optional)

You will receive an email when the cloud recording is available, with a link directly to the recording. Or you can go back to zoom.us and go to the Recordings tab, where you can Share or Download any of your recordings, or click on the recording to access the transcript, if you enabled that functionality:



Lastly, take a deep breath and congratulate yourself! We know this isn't easy and hope this guide proves to be helpful. As we mentioned in the beginning, Zoom software is updated on a regular basis so some of the details in this document may be out of date by the time you are viewing it.

If you need help figuring this out, we're here for you! [Access all of our resources for holding remote meetings](#), or give me a shout:

Sloane Dell'Orto
sloane@getstreamline.com



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