Using Zoom for Candidate Forums
September 15, 2020

Karen Price, LWV Needham
Jo-Ann Berry, LWVMA and LWV Acton Area
Tanya Roy, LWVMA Voter Engagement
Zoom for Candidate Forums

• Zoom Basics (Karen)
• Forum Considerations (Jo-Ann)
• Steps to Set-up Candidate Forum Using Zoom Webinar
Zoom Options for Forums

• Zoom Meeting
  – One type of participant plus host/co-hosts

• Zoom Webinar
  – Two types of participants: Panelists and Attendees
  – Panelists: host, co-hosts, candidates, moderator, timekeeper, question sorter
  – Attendees: Audience to watch the forum live, ask questions via Q+A box, may be made a panelist to ask a question with audio ± video
Webinar

• Live audience
  – Good for live participation
• Collect audience Qs live
• Q+A box for audience; chat box for panelists
• Only panelists seen/heard
• More expensive ($55/mo)
• Limit 100 participants, can upgrade to 500 ($$$)
• More options—a little harder to host
• Better control of what viewer will see
• Unique registration links for panelists and attendees

Meeting

• Not good for live audience
  – OK for recording for future showing
• Collect Qs via email/text
• Only chat box
• All participants can be seen and heard
• $15/month
• Limit 100 participants
• Fewer options—technically easier to host
• Can require registration
• Zoom Rooms
What’s Important to You

- Live Streaming TV
- Live Zoom Audience
- Facebook/YouTube Live
- Show only Recording
- Audience Questions during forum
- Use LWV countdown clocks
- Gallery View or Speaker View
- Screen Sharing
Working with TV Station

• Most will record forum as it happens
• Most will live stream
• Some have a Zoom account you can use and will provide host (meeting more common than webinar)
• Most will share with other cable stations upon request
• Most will post on their websites and give LWV a link to post on website and social media
• If they cannot make recording live, most will show a recording you create from Zoom
Forum “Staff”

• Host—Logs into Zoom to start the meeting/webinar. Has control over all options.
• Co-Host—Assigned by host. Has same control. Takes over if you lose the host. (Not required, but recommended)
• Moderator—Asks questions. Should not be assigned any other job.
• Timekeeper—Could be the co-host.
• Question Sorter—Reads questions in Q+A Box and sends selected questions to moderator via chat (webinar only)
Forum Timekeeping

• Using LWV countdown clocks
  – Available for 30, 60, 90, 120 secs
  – Download files
    https://drive.google.com/drive/folders/1QeYI2jlnFsxeLczRp6Hk10aLinvzzhJm?usp=sharing
  – Assign person other than moderator or host as timekeeper
  – Candidates and moderator must set their screens on gallery view in order to see the clock
Forum Timekeeping

• Timekeeper will need
  – Computer that allows video virtual background
  – A one-inch piece of electrical tape (or other)
  – Access to LWV countdown clocks
  – In Zoom, rename the person “Timekeeper”
  – In webinar, must be a panelist
  – Best if timekeeper does not have another task
Forum Timekeeping

Computer must allow video virtual background
Forum Timekeeping

Settings

Virtual Background

Choose Virtual Background

None
02:00
01:00
30
01:30

Add image
Add Video

I have a green screen
Mirror my video
Forum Timekeeping
Gallery View and Speaker View

For Zoom Meeting/Webinar

- What panelists, audience/TV, and Zoom recording see/show are different
- Participants control what is seen on their own screen (upper right corner)
- Candidates & Moderator must be on gallery view to see countdown clock
- Host & co-host can choose gallery view or speaker view
Gallery View and Speaker View

For Zoom Meeting

• Each participant controls what is seen on her/his/their screen (upper right corner)
• Candidates & Moderator must be on gallery view to see timer
• Cable TV recording/live stream will capture the view that Cable TV participant selects (may toggle during event)
• Zoom recording view (gallery or speaker) must be selected in Zoom settings prior to launching Zoom
• In Active Speaker view, sound controls who is on the screen
Gallery View and Speaker View

For Zoom Webinar

- Each panelist controls what is seen on her/his/their screen (upper right corner)
- Candidates/Moderator must be on gallery view to see timer
- Host selects what Attendees and cable TV recording/live stream (bottom of participant window) will see
- Zoom Recording view must be selected in Zoom settings prior to launching Zoom
- In Active Speaker view, sound controls who is on the screen, but only panelists can unmute.
Timekeeper, Moderator, 3 Candidates (Webinar, Attendee Gallery View)
Webinar/Meeting Zoom Recording

• TV usually records directly off Zoom (meeting participant or webinar attendee view)
• Zoom recording may look different
• Zoom creates video file, audio-only file, text file of chat (if you set option to do so)
• If TV is recording and will share the link, Zoom recording can be a back-up
• Can set Zoom to start recording automatically, then you can trim the beginning
• Or start recording when you are ready, usually the start time. Remember to push the button!
• Announce that you are starting recording
Cloud or Local Zoom Recording

• Local puts files on host’s computer
• Cloud puts files in the Zoom Cloud. You are allotted 1 GB of cloud storage. $40/mo to increase to 100 GB.
• 1-hour forum is about 250-500 MB (1/4 – 1/2 GB) depending on number of people using video
• If you are using LWVMA webinar check that there is space for your cloud recording (ask Brynne)
• You can download your cloud recording to your local computer later
• If you are creating your own recording (rather than using cable TV) read about recording in the Zoom help
Useful Zoom Options

• Limiting the use of the chat box
• Turn off hand raising

Plus, in webinar:
• Set rehearsal before forum, go live on the dot
• Use Q+A for Zoom audience questions
• Auto-send reminder emails

Details will be shown in segment on set-up
Limiting Chat Zoom Meeting

For meetings, the host can allow attendees to chat with everyone or with the host only.

Chatting is distracting for everyone during a forum. Suggest choosing “Host Only.” This allows attendees to chat with host and prevents chat box from showing message to everyone.
Obtaining Zoom

• From LWVMA (contact Brynne)
  – Zoom Meeting
  – Zoom Webinar for 500 participants
• Purchase Zoom Meeting (Pro account)
  – Free account (details on next slide)
  – $14.99 / month; $149.90 / year
• Purchase Zoom meeting with Webinar add-on
  – $14.99/mo + $40.00/mo; limit 100 participants
  – $14.99/mo + $140/mo; limit 500 participants
Free Zoom Meeting Account

- [https://zoom.us/freesignup/](https://zoom.us/freesignup/)
- Unlimited number of meetings
- Unlimited time for less than 3 participants
- Group meetings with 3+ participants are capped at 40 minutes in length
- Meetings cannot be recorded
- Can be a good intro to Zoom, check out options, become comfortable, etc.
Forum Considerations
Prepare in Advance

• Contact candidates to reserve date/time
• Identify moderator, timekeeper, host, co-host
• Reserve Zoom timeslot if using LWVMA account
  – If registration link, get bitly (www.bitly.com)
• Confirm with cable TV, timeslot and level of Zoom support
• Have email address for questions from public
• Prepare Facebook Event, share with co-host Leagues
• Prepare press announcement and send to media and networks
Detailed Candidate Communication

• Before contacting candidates with format
  – Determine format and time limits (opening statement, closing statement, questions, rebuttals, rebuttal round)
  – Check ground rules apply for remote forum
  – Information on rehearsing, arriving early, etc.
  – Using mute, backgrounds, chat box
Prior to Forum

• Prepare script for moderator
  – Give date of recording
  – Ask audience to forgive technical problems
  – Remind candidates to mute

• Prepare questions and question grid

• Host prepare list of actions to take

• Opening and closing slides
Practice Makes Perfect

• Practice Zoom setting and actions
  – Set up as if real forum
  – Ask LWV members to sit in for candidates and moderator; real timekeeper, host, question sorter
  – Record session
• Practice with Moderator
  – Same as above but with moderator
• Practice with Candidates
• Review again 20-30 mins. before start
Muting and Unmuting

- Host can mute Meeting participant and Webinar panelist. Webinar attendees are always muted.
- If you ‘unmute’ participant or panelist, they will get a window asking them to unmute.
- On speaker view, any sound from another participant or panelist will cause the view to change to the person making sound. Therefore, it is best for everyone who is not speaking to mute.
Zoom Audience Questions During Forum

• Predetermine timing for audience questions (e.g. 4th, 7th, 10th questions)
• Question sorter reviews questions as they come in to Q&A box
• Selects questions and chats to Moderator prior to designated time
Help Candidates Look Good!
Steps to Set-up Candidate Forum Using Zoom Webinar
Step-by-Step Webinar Set Up

• Contact Brynne (email suppressed)
  – Tell her you want to do a webinar forum or practice
  – Date, time, name of forum, if registration is required

• Brynne will check for availability and, if OK, will reserve your date (s) and time (s)

• She will give you the user email and password so you can complete the set-up details
Sign In

Email Address

Email Address

Password

Password  Forgot?

Zoom is protected by reCAPTCHA and the Privacy Policy and Terms of Service apply.

Sign In

Stay signed in

New to Zoom? Sign Up Free
Setting Options in Zoom

• There are 3 places to make/change settings
  – In the set-up screens
  – After starting webinar
  – In the “Settings” section. This makes changes for the account, not just your webinar. The only reason you might change a setting is to control the recording format.
Screen after login
### Upcoming Webinars

<table>
<thead>
<tr>
<th>Start Time</th>
<th>Topic</th>
<th>Webinar ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon, Oct 5</td>
<td>LWV Hingham Forum</td>
<td>897 9269 5626</td>
</tr>
<tr>
<td>06:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wed, Oct 7</td>
<td>Norfolk County Sheriff Candidate Forum</td>
<td>852 8090 3785</td>
</tr>
<tr>
<td>04:00 PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Set-Up Screens

My Webinars > Manage "Norfolk County Commissioner Candidate Forum"

**Topic**: Norfolk County Commissioner Candidate Forum
**Description**: The Leagues of Women Voters of Needham and the other Leagues in Norfolk County will co-host a candidate forum for Norfolk County Commissioner (vote for 2). Candidates are Independent Heather Hamilton and two Democrats.

**Time**: Oct 14, 2020 04:00 PM Eastern Time (US and Canada)
**Add to**: Google Calendar, Outlook Calendar

**Webinar ID**: 825 0303 3304

**Webinar Passcode**: ********

**Video**: Host: On, Panelists: On
Webinar Options

- Q&A
  For attendees to ask Qs

- Enable Practice Session
  For pre-launch time

- Only authenticated users can join

- Make the webinar on-demand

- Automatically record webinar
  Starts recording when webinar
  Broadcast starts.
Q&A vs. Chat

• Q&A specifically designed for asking a speaker questions
• Chat pops up on the screen, Q&A just shows a red dot
• Can control who sees Q&A
Practice Session Enabled

- When host starts Zoom webinar, will be in practice mode
- May start practice mode anytime before webinar starts.
- Click “Broadcast” to start webinar for audience. Also starts recording if you chose to start automatically.
- Warning: can only use practice mode once
Zoom Webinar Registration and Invitations

• For panelists, invitations are unique to each person.
  – Zoom automatically sends invitation emails.

• For attendees
  – Join by registering in advance (recommended)

• Customize name and email address for the emails to the panelists and attendees

• Zoom can send reminders to panelists and attendees
Webinar Size: 500 attendees

Registration Link
https://us02web.zoom.us/webinar/register/WN_7Znx3p5WTtI8ztfrC3dFuw

Source Tracking Link

You have not yet created any source tracking links

Approval
Automatically Approve

Options
- Close registration after event date
- Allow attendees to join from multiple devices
- Show social share buttons on registration page

Manage Attendees
Registrants: 1
Automatically Approved
Panelist Window

• Enter names as you want them to appear in Zoom (as on ballot, usually)
• Make sure emails are correct and the preferred email address
• Use names like “Timekeeper,” “Question Sorter,” “[Candidate Name (R)]”, “[name], Moderator”
• Names can be changed live, but easier to get them right here.
Invite Panelist Window

Panelists

Invite a person or a Zoom room as a webinar panelist

<table>
<thead>
<tr>
<th>Name</th>
<th>Email/Zoom Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timekeeper</td>
<td><a href="mailto:JenJone99@gmail.com">JenJone99@gmail.com</a></td>
</tr>
</tbody>
</table>

Add Another Panelist

Send invitation to all newly added panelists immediately

Save  Cancel
Very Important: Change email settings for this webinar. By default it is Brynne, but you want to make it specific to you or a group name like LWV of Hingham.
Remember the Name so you can tell the candidates to look for an email from “LWVs of Norfolk County.”
## E-mail Settings

<table>
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<tr>
<th>Invitations</th>
<th>Email Settings</th>
<th>Branding</th>
<th>Polls/Survey</th>
<th>Q&amp;A</th>
<th>More</th>
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<tr>
<th>Select Email Language: English</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Contact: LWVs of Norfolk County, <a href="mailto:karenprice.ma@gmail.com">karenprice.ma@gmail.com</a></td>
<td>Edit</td>
</tr>
<tr>
<td>Invitation Email to Panelists</td>
<td>Edit</td>
</tr>
<tr>
<td>Confirmation Email to Registrants</td>
<td>Send upon registration</td>
</tr>
<tr>
<td>Reminder Email: Send 1 hour, 1 day and 1 week before webinar</td>
<td>Send me a preview email</td>
</tr>
<tr>
<td>No follow-up email to Attendees</td>
<td>Edit</td>
</tr>
<tr>
<td>No follow-up email to Absentees</td>
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## Select Email Language:
- **English**

## Email Contact:
- **LWVs of Norfolk County, karenprice.ma@gmail.com**

### Invitation Email to Panelists

**Confirmation Email to Registrants**
- **Send upon registration**

**Reminder Email:**
- Send 1 hour, 1 day and 1 week before webinar

### No follow-up email to Attendees

### No follow-up email to Absentees
Here you can say, for example, email questions@gmail.com prior to [date] to submit a candidate question in advance.
## Email Settings

**Select Email Language:** English

**Email Contact:** LWVs of Norfolk County, karenprice.ma@gmail.com

**Invitation Email to Panelists**

**Confirmation Email to Registrants** Send upon registration

**Reminder Email:** Send 1 hour, 1 day and 1 week before webinar

**No follow-up email to Attendees**

**No follow-up email to Absentees**
These reminders go to registrants and panelists.

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**Reminder Email**

**Send Reminder Email to Approved Registrants and Panelists**

- [ ] 1 hour before the webinar start date and time
- [ ] 1 day before the webinar start date and time
- [ ] 1 week before the webinar start date and time

**Subject**

Reminder: [Meeting Topic] starts in [time]

**Body**

Hi [User Name],

This is a reminder that “Norfolk County Commissioner Candidate Forum” will begin in 1 hour / 1 day / 1 week on:

**Date Time:** Oct 14, 2020 04:00 PM Eastern Time (US and Canada)

Join from a PC, Mac, iPad, iPhone or Android device:

- [Click Here to Join](#)
- Note: This link should not be shared with others; it is unique to you.
- Passcode: 041541
- [Add to Calendar](#)
- [Add to Google Calendar](#)
- [Add to Yahoo Calendar](#)

Or join by phone:

US: +1 929 205 6099 or +1 301 715 8592 or +1 312 626 6799 or +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799

Webinar ID: 825 0303 3304

International numbers available: [https://us02web.zoom.us/u/kdUKNOCFcS](https://us02web.zoom.us/u/kdUKNOCFcS)
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- **Invitation Email to Panelists**: Edit
- **Confirmation Email to Registrants**: Send upon registration
- **Reminder Email**: Send 1 hour, 1 day and 1 week before webinar
- **No follow-up email to Attendees**: Edit
- **No follow-up email to Absentees**: Edit
Q&A Settings

If you want to allow attendees to ask written questions during the webinar, Q&A is better than chat. Chat can be set only for panelists and host.

Your question sorter should practice using Q&A box.
If you want to use any of these live settings, read the help files for details.
End of Webinar Set-Up

Now, More Settings During Webinar
Starting the Webinar

• Log into LWVMA Webinar 500
• Find your webinar and click start button
• If you chose practice session, you will be in practice mode
• You may set the following options during practice mode, prior to other panelists joining
Gallery/Speaker in Webinar

Can be toggled between Active Speaker and Gallery during webinar.
Or, can be set on one and left.
Following the host requires host not be distracted!
Suggested settings

✔️ Mute participants on entry
✔️ Allow participants to unmute themselves
✔️ Allow participants to rename themselves
  Play Chime for Enter/Exit
  Play Chime for Chat Messages/Raise Hand
  Lock webinar
✔️ Allow panelist start video

low attendees to:
  Raise hand
  View the participant counts

Layout for attendees:
  Follow host view mode
✔️ Active speaker view
✔️ Gallery view
For webinars, the host can allow attendees to chat with no one, with all panelists (including host), or with all panelists and attendees.

Chatting is distracting for everyone during a forum. Suggest choosing “No One.” This only prevents Webinar attendees from chatting. Panelists can chat with attendees, panelists and host.
If someone other than host is screen sharing be sure to choose “All Participants” in Advanced Sharing Options.
Sample Opening / Closing Slides

LWV LEAGUE OF WOMEN VOTERS
of Sharon-Stoughton • Brookline • Needham • Norwood
• Wellesley • Westwood-Walpole-Dedham
In collaboration with The Needham Channel

Norfolk County Sheriff Candidate Forum
October 7, 2020
Election November 3, 2020

The League of Women Voters is a non-partisan organization that does not endorse parties or candidates.

Massachusetts Election
Vote in Person: November 3, 2020

Voter Registration Deadline: Oct 24
Early Vote by Mail: Apply for ballot by Oct 28
Early Vote in Person: Oct 17-30
Mail-in Ballots Postmarked: Nov 3
Mail-in Ballots Received: Nov 6

LWV Voter Guide: www.VOTE411.org
Host Controls for Individual Panelists
(after panelist joins)

- Chat
- Stop Video
- Make Host
- Make Co-Host
- Allow Record
- Rename
- Put in Waiting Room
- Remove
If You Are Using LWVMA Webinar

• Brynne will schedule webinar, whether forum or rehearsal.
• She will only schedule one hour prior to or one hour after scheduled time of another webinar.
• If your date/time needs to be changed, inform Brynne of the change.
• If you change recording settings, do it within a hour of starting and change it back within an hour of ending.
• If you record to the cloud, download the recording to your computer and delete it from LWVMA recordings within 24 hours.
• If you need the host key look in the Profile section of the Zoom account (needed for Zoom rooms)
Forum Resources (from Karen)

- Google Drive link [available from Karen]
  - Countdown clocks and how to use
  - Generic task spreadsheet
  - Sample rundown spreadsheet
  - Sample communications with candidates
  - Sample press announcement, flyers
  - Sample opening / closing slides
  - Generic script
  - Generic Zoom action list
Stuck on Zoom?

• Look at Zoom help
• Google your problem
• Ask Brynne
• Ask Karen