



**2022-23: Imagination to Action**  
**Document 6**  
**Supplies, Equipment, and Tips for *Virtual Meetings / Hybrid Meetings***

**NOTE: There are several platforms for remote presentation.**

These instructions are focused on using Zoom for your virtual session. If you plan to use a different virtual meeting platform, follow the same general guidelines indicated below.

**Promotion of Session**

- Plan your promotion - implement the plan.
- Involve District Leaders and AGs to promote the session(s).
- Use website media and social media to promote the session(s).
- See Document 3 for samples of promotional information to edit for your district.

**Arranging your Online Meeting**

- Use the [registration feature](#) associated with your platform to register attendees and to facilitate pre-meeting communication, such as [reminder emails](#) and sending an email with *Toolkit* items.
- Arrange for a [Zoom Host](#) (Tech Person) who will manage the technology in the background. This person can facilitate putting attendees into breakout rooms, monitor the chat box, manage the screen sharing, and troubleshoot attendees' concerns. Having a Zoom Host frees the Organizer and others to focus on the presentation. As a backup and assistant for the Zoom Host, also appoint a Co-Host. Be sure that the Zoom Host logs in to the Zoom account at [www.zoom.us](http://www.zoom.us) to start the meeting.
- Conduct a practice session:
  - With Presenters
  - With Breakout rooms, and include Breakout Facilitators in the practice session
  - With PowerPoint slides
  - With multiple presenters sharing their screens
- Review the YouTube Zoom video for trainers at [this link](#).

**Showing a Panel View with Zoom**

- To show a panel on Zoom, access the Spotlight feature via "the video icon/More" for each participant on the Participant list. "Spotlight Everyone" for the 1<sup>st</sup> panelist. Then, add other panelists via the "the video icon/More" with "Add Spotlight." To end the panel view, go via "the video icon/More," and use "Remove Spotlight" for each panelist. To remove the last panelist, click on "End Spotlight" on the upper left of the screen. When you remove the last panelist, the screen will be in "Speaker View." You can change that to "Gallery View" via a choice in the upper right area of your screen. (You can shortcut having to go to the Participants list, by clicking



on the ellipsis (...) on the picture of each panelist. To remove the last panelist, click on “End Spotlight” on the upper left of the screen.)

- If you want to record the meeting and want the panel to appear in the recording, record to your computer and then you can upload that recording elsewhere, such as to Vimeo. If you record the meeting to a Zoom account, the panel will not show in the recording; rather, as each person speaks while on the panel that person will be shown in speaker view. Here is a link for more information on panel view in Zoom: [Zoom document that explains spotlighting](#)
- BE SURE TO PRACTICE WITH THE PANEL FEATURE BEFORE PRESENTING **ONE SUMMIT**.

### Breakout Facilitators

- Use experienced or well-trained facilitators to lead the discussions.
- It is essential to have a training session, including a practice session and how ideas will be recorded, for **all** facilitators. Here is a link for information on breakout rooms using Zoom: [Managing Breakout Rooms](#)
- You may want to offer two identical training sessions to accommodate the schedules of facilitators.

### Breakout Groups

- Be intentional about forming groups for breakout rooms.
  - Have a good mix of club members.
  - Limit the number of persons from one club to no more than two per breakout room.
  - You can assign participants to breakout rooms or have random assignments. You can mix as appropriate. Even though Zoom allows you to pre-assign participants to breakout rooms (link for Zoom instructions: [pre-assign](#)), the reality is that it is much easier to do it at the beginning of your Zoom meeting. Your Zoom host or co-host may be doing that in the background at the beginning of your session.
- Ask participants to have names, not phone numbers, displayed with their pictures. (*The Zoom Host/co-host can assist if participants don't know how to rename themselves.*)
- For multi-club and/or multi-district meetings, ask participants to include their district number or club name and/or their title with their name.
- Tips for meeting administration – ensure the Zoom Host understands and can assist with, as needed:
  - Muting (individual and all), chat box, polls
  - Duration time feature for speakers
  - Broadcast messages into breakout rooms
  - Breakout room questions/feedback



## Equipment and Supplies

- Excellent quality sound and video equipment critical for presenters and facilitators. Use computers, not phones or tablets. Wear a noise canceling headset.
- Test any videos or PowerPoint presentations on the computer and online platform for compatibility and operation procedure. Be sure to check the “share computer sound” button when sharing a video on Zoom.
- Breakout room facilitators should share their screens and use a Word document to capture participant ideas and input. The Word doc can be referred to for feedback to the entire group and can then be immediately forwarded to the organizer, so all ideas are captured.

## Printed Materials

Prior to your virtual **One Summit**, email the *Sharing Ideas – Imagination to Action Scenarios* (Doc 9) and Action Toolkit items (Docs 12a-d) to everyone registered for **One Summit**. Ask them to have printed copies of these documents handy during **One Summit**. (*Proactively sending these materials is better than asking registrants to go somewhere else to download them.*)

You can also post the Action Toolkit items on your district website in addition to sending the Action Toolkit items by email. If you do, inform participants during **One Summit** that all Action Toolkit items can be accessed on your district website.

## Suggestions for recording and sharing ideas from the *Sharing Ideas* segment and the *Moving to Action for Impact* segment

- Devise a way that works for you to collect the ideas generated at the session, and then share those ideas back across your district after **One Summit**. For example:
  - The facilitator or a scribe will key ideas into a Word doc or Windows Ink Workspace while sharing screen to ensure capture of participants’ ideas, just as you would on a flipchart.
  - The Breakout Facilitator will send those notes to the Organizer immediately after **One Summit**.
- *Moving to Action for Impact* segment ideas should be recorded by someone designated by the Organizer.

## Other Notes and Tips

- The PowerPoint slide deck contains one slide that has the basic Zoom etiquette points on it. This should suffice for Zoom instructions. Questions beyond the basics can be entered into the chat and handled by the Zoom host.



- Using the PowerPoint in the materials is highly recommended. On the **One Summit (fka One Rotary Summit or ORS)** page of [www.zones25b-29.org](http://www.zones25b-29.org), open Doc 11, enable editing, “Save As” with a file name of your choosing, and then complete it with district information, such as district number and other information you want to include.
- Be sure to safeguard and use the full time allotted for the ‘*Moving to Action for Impact*’ segment. This segment is essential for an effective session.
- Record the session so you have material for promotion of other future events.
- Have a timekeeper and stick to the schedule you set for the event. Stay on time and on topic! For the *Sharing Ideas* segment, each item has a time stated in the *Breakout Facilitator Guide* (Document 8). Each Breakout Facilitator can appoint a timekeeper to help ensure that the time for each item be adhered to. The Zoom host will send messages into the breakout rooms to let facilitators and timekeepers know when it’s time to move to the next question. (*Use the Zoom broadcast meeting control option to send a message to all in the breakout rooms.*) During the *Sharing Ideas* segment, announcing the time remaining for that segment during the last 10 to 5 minutes is essential. *Set up Zoom to notify participants at 5 minutes, 1 minute.* NOTE: When a breakout room session is started, the Zoom host may set the duration of the breakout by clicking on the breakout options setting. The default time is ten minutes.
- Have a planned approach to manage people desiring to make promotional announcements. These announcements can take valuable time away from the reasons to be at **One Summit** and lead to others wanting a minute to promote. **If you decide to allow them**, it is necessary to be sure that those who desire to make announcements know and adhere to the time limit for any such announcements.
- **RECORDING:** The large group session can be recorded by the Zoom host. Breakout sessions can be recorded locally by the facilitators.

## HYBRID SESSIONS

If you are conducting a live session with remote attendees, the following will help make it an effective session for the remote attendees:

- Use a good camera to follow the presenters, versus trying to move a computer to follow them.
- The presenters should use a microphone to be heard by the remote audience.
- Share screen for any PowerPoint information, rather than having the remote participants viewing a projection on a screen.
- During breakout session, have a facilitator (trained like the in-person trainer) lead a session with the remote attendees.

**Be excited about having people attending and wanting to learn!**