

## ZOOM MEETING PLANNING CHECKLIST

### (FOR ZOOM MEETING ADMINS)

This document is intended to serve as a handy checklist of essential tasks that a Zoom Meeting Admin (ZMA) should plan to address when creating and conducting a Zoom meeting. This is a generic template – each ZMA can customize this template to better suit the needs of their committee or council.

#### When creating a Zoom meeting invite

- ☐ Designate at least one attendee as a **Co-Host** (e.g. a CAP staff who has a Zoom account). A **Co-Host** has the same rights as the meeting hosts and serves as a valuable backup to start the meeting if the meeting host is running late
- ☐ **Enable Waiting Room** if you don't want the participants to join before you or a co-host joins the meeting
- ☐ Enable **Mute participants upon entry** to avoid open mics when attendees join the meeting
- ☐ Attach your **Housekeeping slides** to the meeting invite and ask attendees to review the housekeeping rules before joining

#### After creating a Zoom meeting invite

- ☐ (Highly recommended) **Reach out to first-time presenters and co-hosts** to check if they want to rehearse sharing their screen, taking/giving control, etc.
- ☐ **Reach out to first-time Zoom attendees** to download Zoom on their machine and walk them through the meeting join process

#### Conducting a Zoom meeting

- ☐ Login to the Zoom meeting at least **5 minutes before scheduled start**
- ☐ Once Committee/Council chair logs into Zoom meetings, designate him/her as **Co-Host**
- ☐ Select the meeting **appropriate chat option** (chat with everyone, chat privately or no chat)
- ☐ Under **Security** icon:
  - ☐ Confirm if you want to allow participants to **share their screen**
  - ☐ Confirm if you want to allow participants to **rename themselves**
  - ☐ Confirm if you want to allow participants to **unmute themselves**
- ☐ Display and read through the **Housekeeping** slide(s) at the start of the meeting
- ☐ For attendees **joining via phone**, edit phone number in Zoom tile with attendee's name
- ☐ Turn on **recording** if agreed upon with committee chair

#### After a Zoom meeting

- ☐ If meeting was recorded, check status of recording. Per protocol, **archive or delete the meeting recording**
- ☐ **Review meeting chat transcript** (if enabled) to check if unanswered questions exist/follow-up is needed
- ☐ **Document lessons learnt** and share with other ZMAs