

Using Zoom Meetings to hold public meetings

Published April 23, 2020

We've been working to help so many public agencies figure out how to hold remote public meetings using Zoom that we decided we'd write our own guides! The first one was on Zoom Webinar, this one is focusing on using Zoom Meeting without the Webinar add on. 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 creating this guide on using Zoom Meetings by popular demand, but just keep in mind that if you are a district with a lot of public participation at your meetings, you may want to consider looking at the Webinar add on. (It's a subscription starting at \$40 per month, in addition to the \$15 per month for Zoom Meetings Pro. We definitely do not suggest that you use a free Zoom account for public meetings.)

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 functionality.

It may help you to know that when I use the word Webinar in this document, I am referring to the **Zoom Webinar add on**. When I use the word "meeting" I am talking about your **public meeting**, but if it's capitalized, as in **Zoom Meeting**, I am referring to the software itself.

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 ([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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Sign up for one Zoom Meeting account for whomever will be hosting your meetings (required)

The first step is to set up your initial [Zoom Pro Meetings account](#) (please don't use the free account, sign up for the Pro account for \$15/month). Keep in mind that you don't need more than one host account - everyone else can be included - even board members - without having a paid Zoom account.

Note: if you want to take advantage of automatic transcription of your cloud recordings, you would need to sign up at least 10 people on the Business plan at \$20/month. :(

Go to zoom.us and click on **Plans & Pricing**:

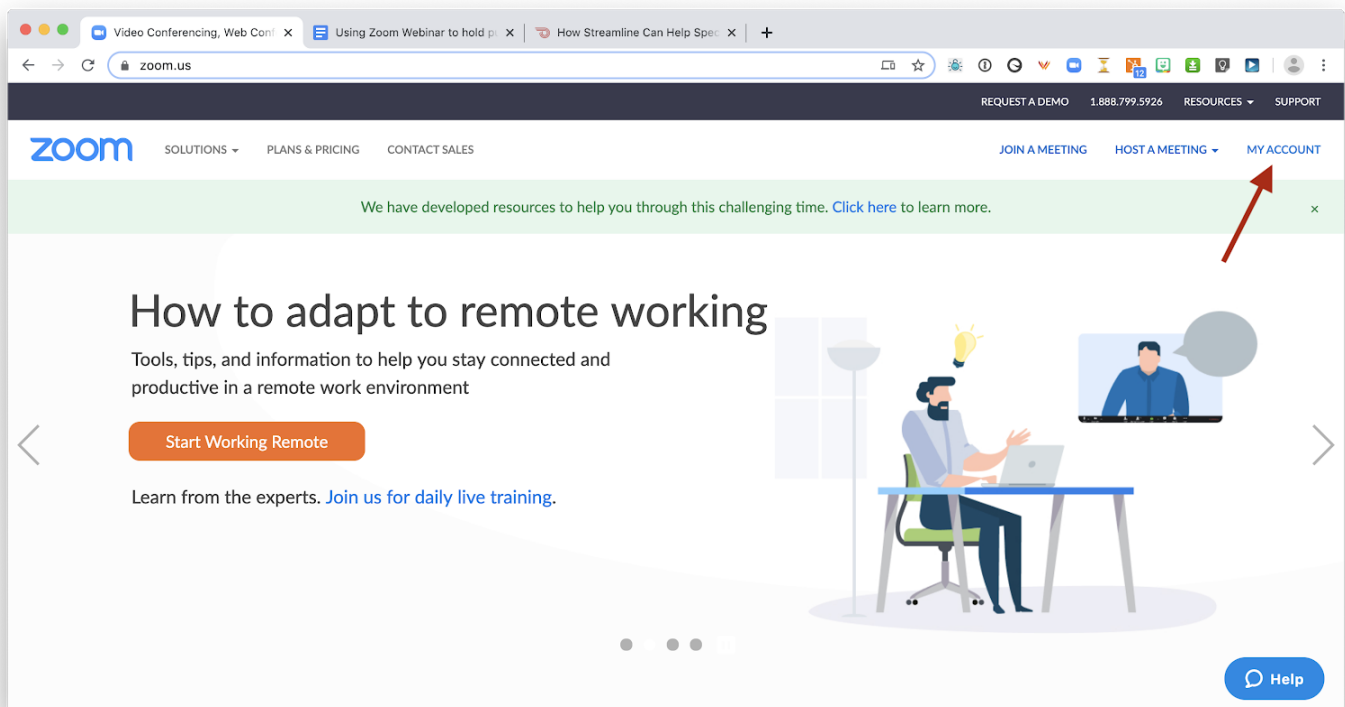
The screenshot shows the Zoom website's 'Plans and Pricing' page. The 'PLANS & PRICING' link in the top navigation bar is circled in red. The page displays four pricing plans: Basic (Free), Pro (\$14.99/mo/host), Business (\$19.99/mo/host), and Enterprise (\$19.99/mo/host). Each plan includes a list of features and a 'Buy Now' or 'Sign up' button. A chat bubble is visible in the bottom right corner.

Plan	Price	Key Features	Button
Basic Personal Meeting Free	Free	Host up to 100 participants Unlimited 1 to 1 meetings 40 mins limit on group meetings Unlimited number of meetings Ticket Support + Video Conferencing Features + Web Conferencing Features	Sign up, It's Free
Pro Great for Small Teams \$14.99 /mo/host	\$14.99	All Basic features + Includes 100 participants Meeting duration limit is 24 hrs User management Admin feature controls Reporting Custom Personal Meeting ID	Buy Now
Business Small & Med Businesses \$19.99 /mo/host	\$19.99	All Pro features + Includes 300 participants Dedicated phone support Admin dashboard Vanity URL Option for on-premise deployment	Buy Now
Enterprise Large Enterprise-Ready \$19.99 /mo/host	\$19.99	All Business features + Enterprise includes 500 participants Enterprise Plus includes 1,000 participants Unlimited Cloud Storage Dedicated Customer Success Manager Executive pricing, let me know!	Contact Sales

Choose the Pro plan, and go through the checkout process. Keep in mind that you're only committing to just under \$15 right now - you can always cancel later.

Also, please use whatever email address you want to be the official host account. If you think multiple people will need to host Zoom Meetings, and you can't afford multiple host accounts, use a generic district email address that you don't mind sharing amongst friends. ;-)

You may need to check your email to activate your new Zoom account. Once that's done, go back to zoom.us in your browser and log in. Then click on **MY ACCOUNT** in the upper right:

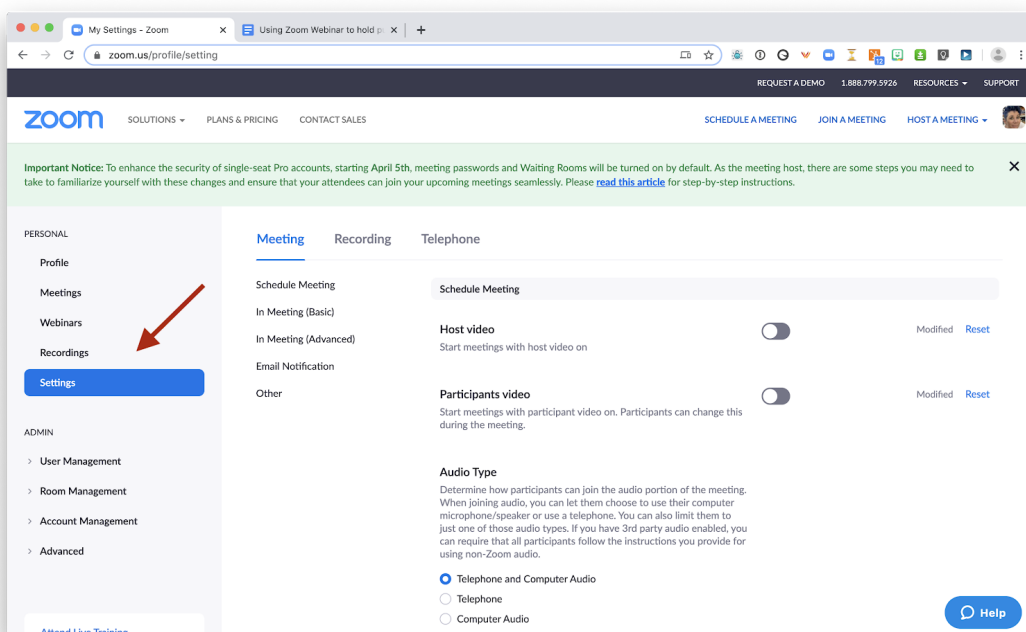


Account settings to check / configure (optional)

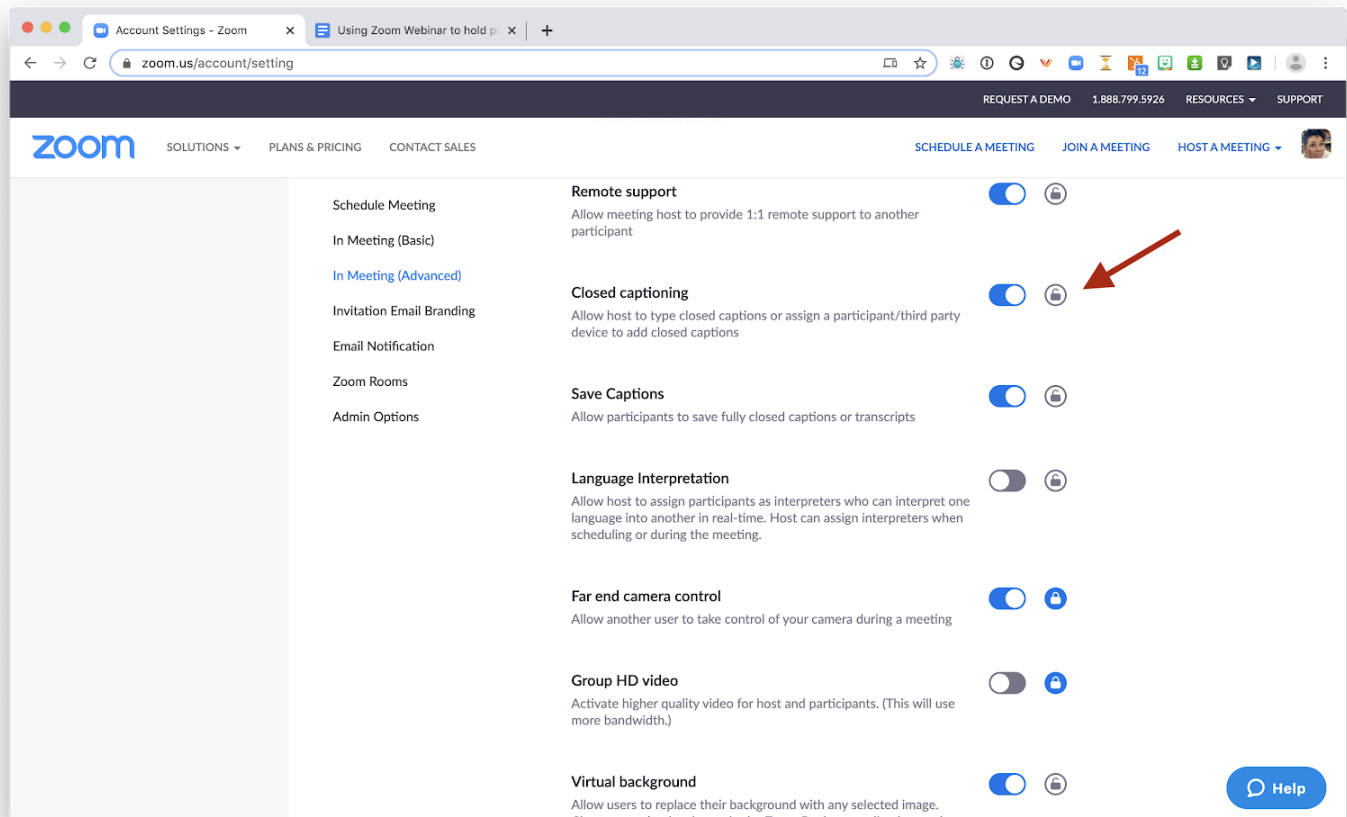
Now on to a few settings you may want to configure. These are optional, but highly recommended!

Enable Closed Captioning

On the left side of the screen, click on Settings.



Then scroll down a bit until you find Closed Captioning, and turn it on if you'd like to enable this option. This allows you, or any one you choose, to type captions while the meeting is happening so that people with hearing issues can read on the screen what is happening. Keep in mind that it's not automatic, so someone needs to be typing what is being said in real time. 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!

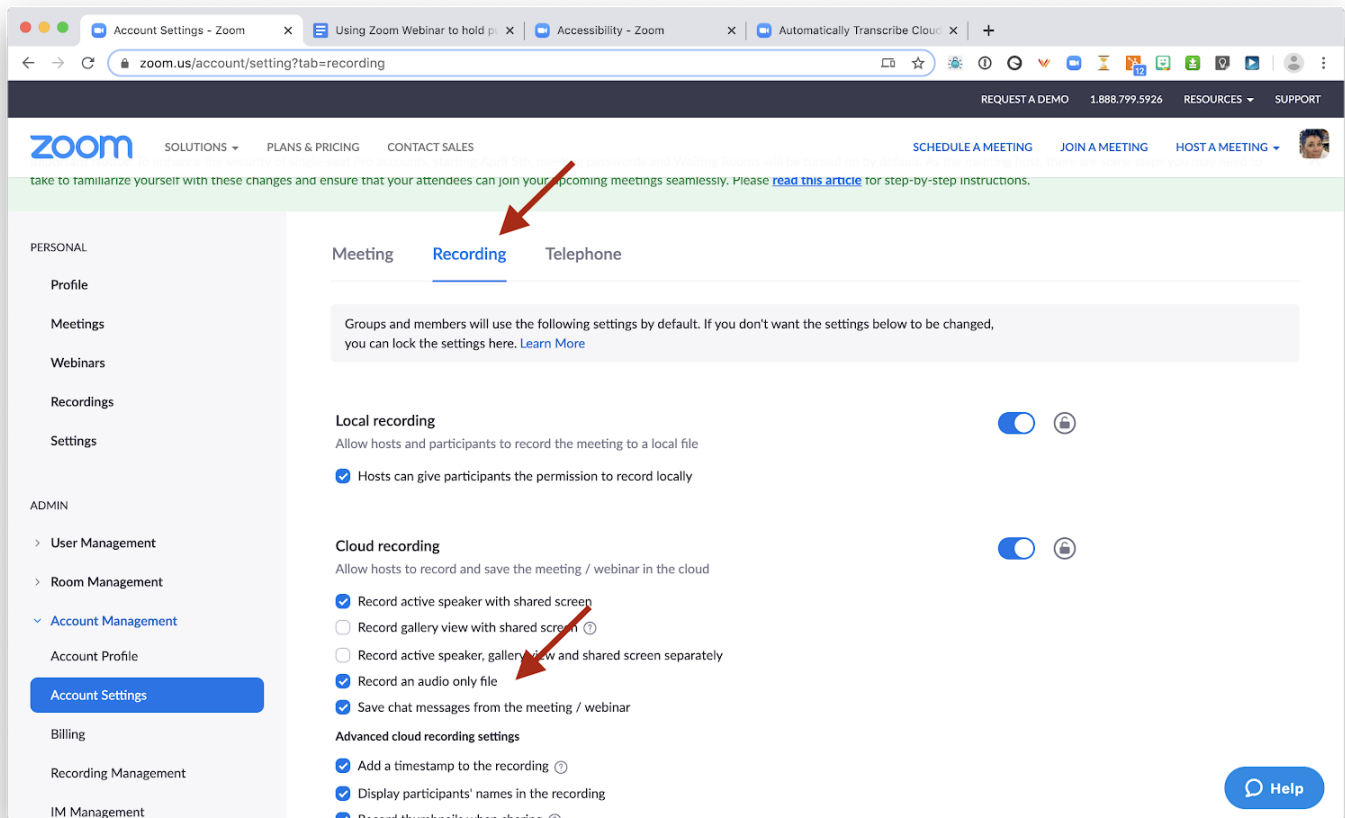


You might consider adding language to all of your meeting notifications, including at the top of each agenda, that you will provide accessibility help (like closed captioning) for those who request in advance. That way you aren't typing away like mad if it's not necessary!

Closed captioning could be a great way to jumpstart a transcript of the meeting.

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.

You can also enable saving chat messages here, which will be handy if you use chat for public comment.

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

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

Keep on keeping on! ↓

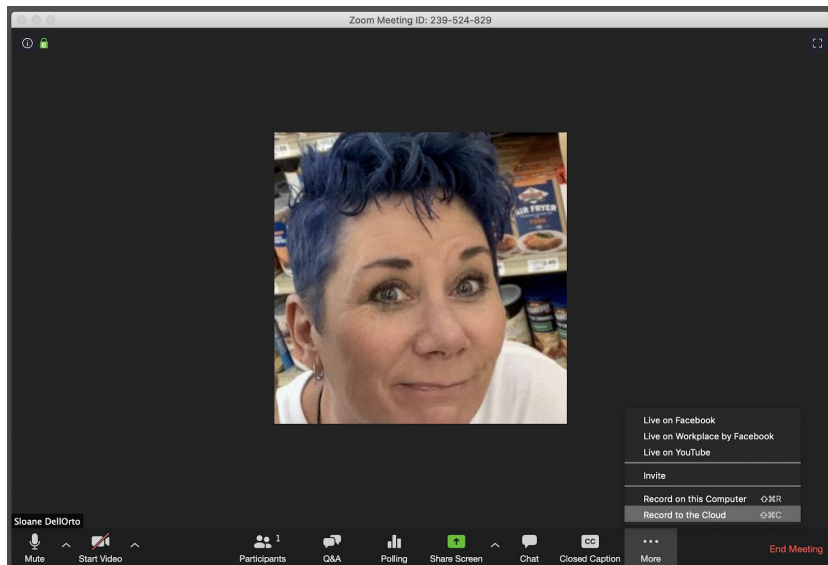
(...next page please)

What people will see when you speak

When people speak, Zoom shows either:

1. Their video, if it is on
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 and don't have a Zoom account with a picture

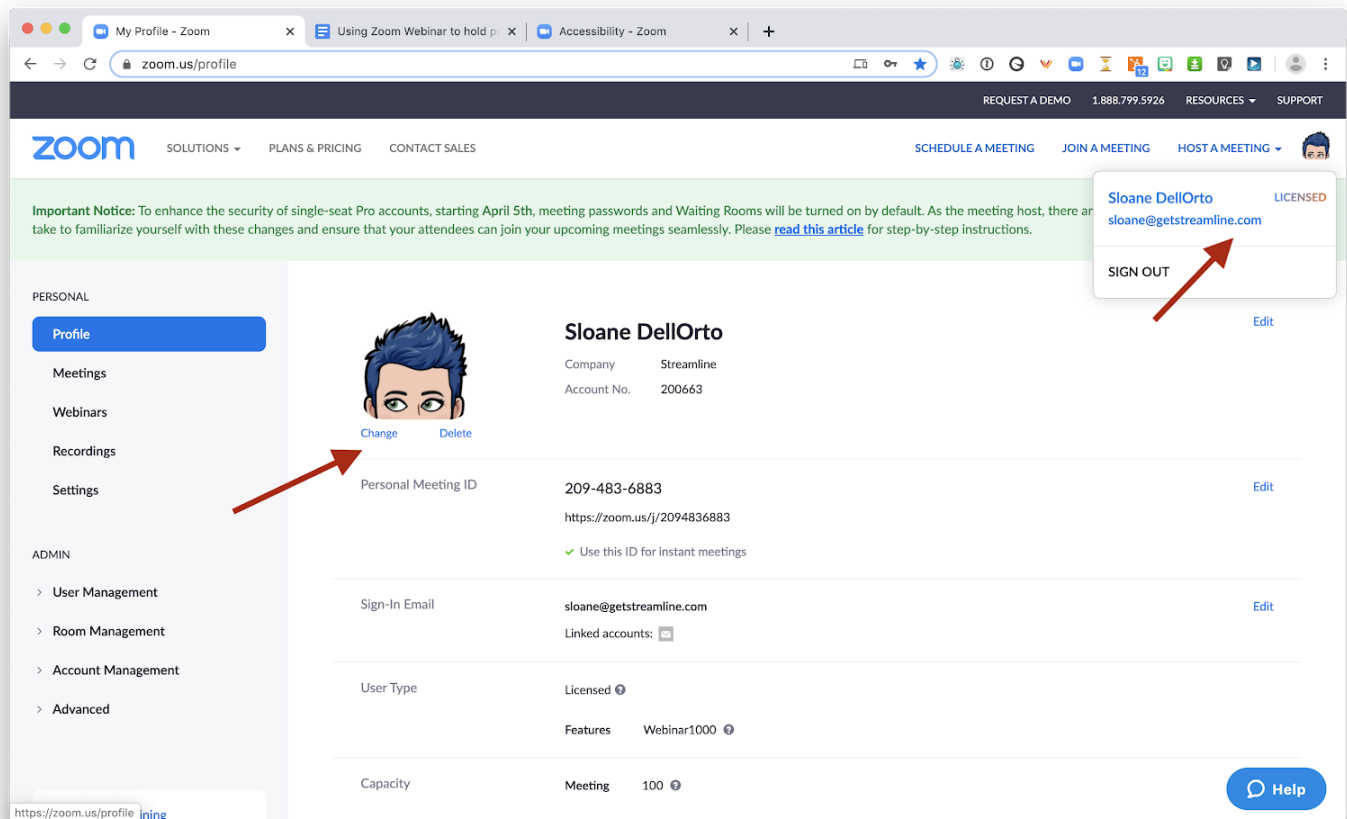
(If they have joined via phone, their phone number will show.)



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:

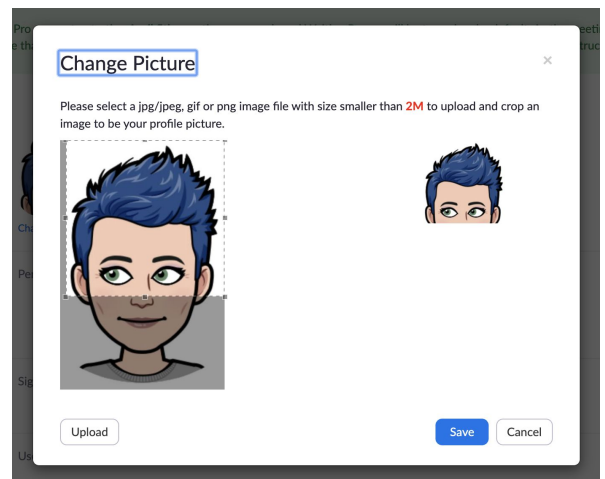
1. **Board and staff all enable video.** This allows you to see each other, and the public to see your faces, too. People tend to behave better when they see a person vs. some disembodied voice! It's also easier to run a meeting without interrupting one another when you can see everyone. (If you haven't 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 Zoom Meeting 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:

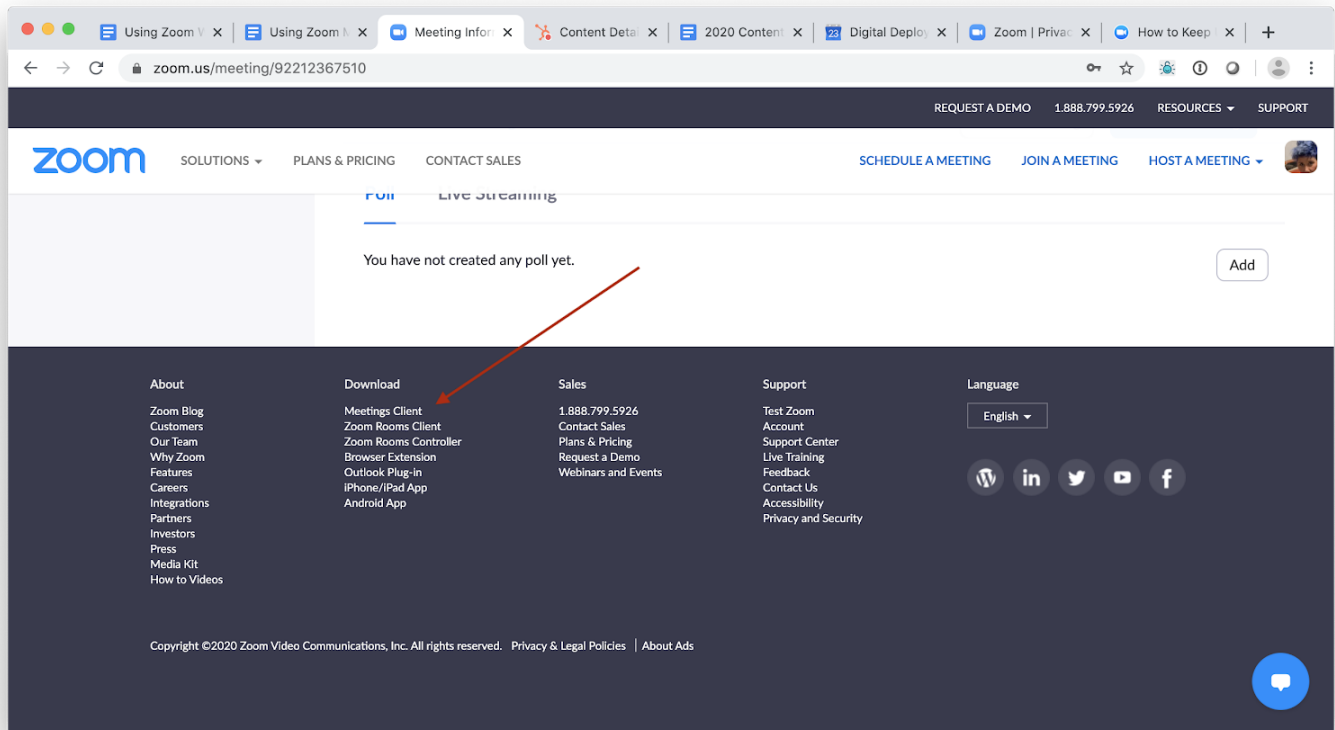
Note that it will crop to a square, so you may want to prep your logo or picture in advance. But it’s worth taking a few minutes to get a decent logo or image in place, as that is what will show *every time you speak* if your video is not enabled. (As you can see, my image hasn’t gotten less goofy -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

Download the Zoom app (strongly suggested)

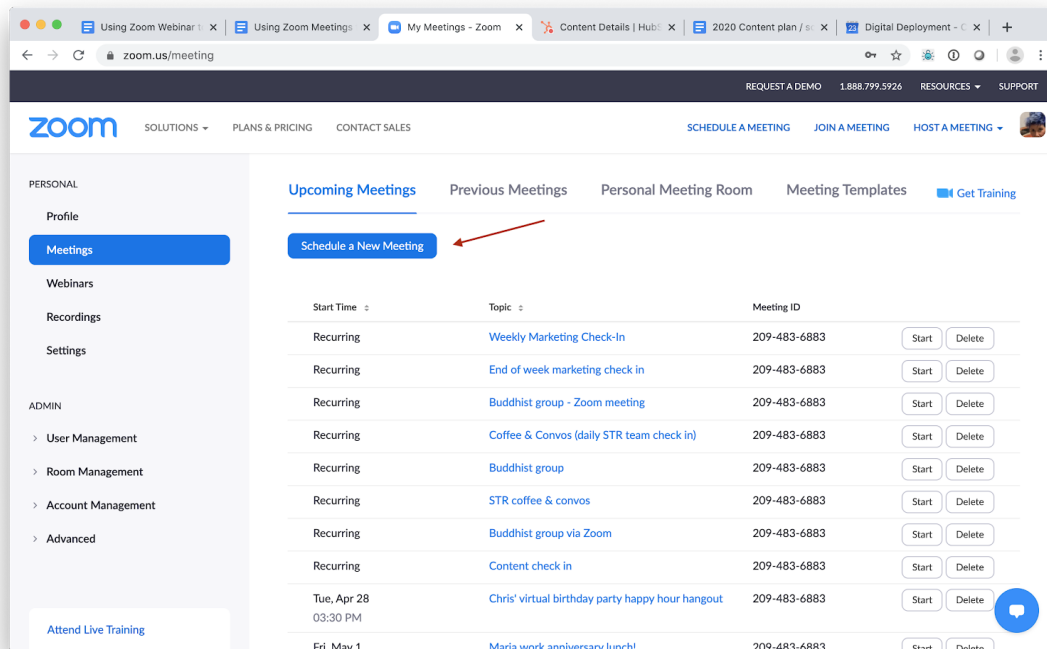
While you can technically use Zoom using only a browser, your meeting quality will be low. Plus, the app provides all of the controls you need. So go grab the app now! On the zoom.us site, scroll down to the footer area, and click on Meetings Client (under Downloads, in the second column):



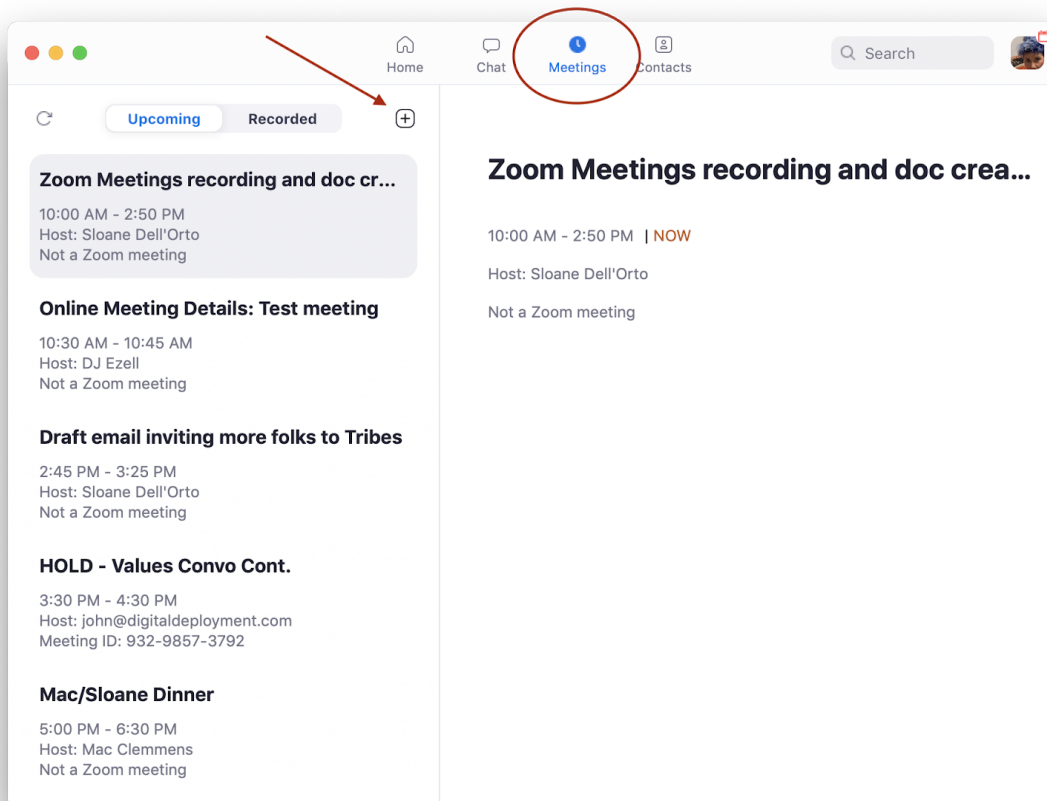
Once you install the app and get it up and running, you can start a meeting anytime, just to get used to the tools. Meetings can be scheduled, or you can start one anytime.

Scheduling your meeting (required)

This can be done on the zoom.us website, or in the Zoom app. Once you're in your account at zoom.us, click on **Meetings**, then click on the **Schedule a New Meeting** button:



Or, in the app, go to the **Meetings** tab and click the + sign:



Now let's look at our meeting settings:

Schedule Meeting

Topic
Meeting About Some Amazing Topic

Date
4/23/2020 12:00 PM to 4/23/2020 12:30 PM
☐ Recurring meeting Time Zone: Pacific Time (US and Canada) ▾

Meeting ID
☒ Generate Automatically ☐ Personal Meeting ID 209-483-6883

Password
☐ Require meeting password

Video
Host ☐ On ☒ Off
Participants ☐ On ☒ Off

Audio
☐ Telephone ☐ Computer Audio ☒ Telephone and Computer Audio
Dial in from United States [Edit](#)

Calendar
☐ iCal ☒ Google Calendar ☐ Outlook ☐ Other Calendars

Advanced Options ▾

[Cancel](#) [Schedule](#)

You may want to use the PMI (personal meeting ID) if you want it to be the same for every meeting ... but note that this also makes it much easier for random people to join you. (Some of the Zoom bombing we've all heard about has happened by random people just trying a bunch of numbers until they land in a live meeting.)

You probably won't use the **meeting password** for public meetings, but might for closed sessions. If you're going to use Zoom Meetings for closed sessions, your best bet is to schedule it separately from the public meeting and use the password feature.

Advanced options - click the arrow to expand:

The screenshot shows the Zoom meeting scheduling window. At the top, the date and time are set to 4/23/2020 at 12:30 PM to 1:00 PM. The 'Recurring meeting' checkbox is unchecked, and the 'Time Zone' is set to 'Pacific Time (US and Canada)'. Under 'Meeting ID', 'Generate Automatically' is selected. Under 'Password', 'Require meeting password' is unchecked. Under 'Video', 'Host' is set to 'Off' and 'Participants' is set to 'Off'. Under 'Audio', 'Telephone and Computer Audio' is selected, with a link to 'Dial in from United States'. Under 'Calendar', 'Google Calendar' is selected. The 'Advanced Options' section is expanded, showing several checkboxes: 'Enable Waiting Room' (checked), 'Enable join before host' (unchecked), 'Mute participants on entry' (checked), 'Only authenticated users can join: Sign in to Zoom' (unchecked), and 'Automatically record meeting' (unchecked). Below these is the 'Alternative Hosts' field with the example text 'john@company.com;peter@school.edu'. At the bottom right are 'Cancel' and 'Schedule' buttons. A red arrow points to the 'Enable Waiting Room' checkbox.

4/23/2020 12:30 PM to 4/23/2020 1:00 PM

☐ Recurring meeting Time Zone: Pacific Time (US and Canada)

Meeting ID

☒ Generate Automatically ☐ Personal Meeting ID 209-483-6883

Password

☐ Require meeting password

Video

Host ☐ On ☒ Off Participants ☐ On ☒ Off

Audio

☐ Telephone ☐ Computer Audio ☒ Telephone and Computer Audio

Dial in from United States [Edit](#)

Calendar

☐ iCal ☒ Google Calendar ☐ Outlook ☐ Other Calendars

Advanced Options ^

☒ Enable Waiting Room

☐ Enable join before host

☒ Mute participants on entry

☐ Only authenticated users can join: Sign in to Zoom

☐ Automatically record meeting

Alternative Hosts:

Example:john@company.com;peter@school.edu

Cancel Schedule

Note the last option - if you want to go the extra mile, you can have your board and staff members create free Zoom accounts, then you can add any of them as Alternative Hosts. This is a good idea because then you have a second person who can help with muting, etc., if needed.

You will have the most control over the meeting in the beginning if you choose Enable Waiting Room and Mute all Participants on entry.

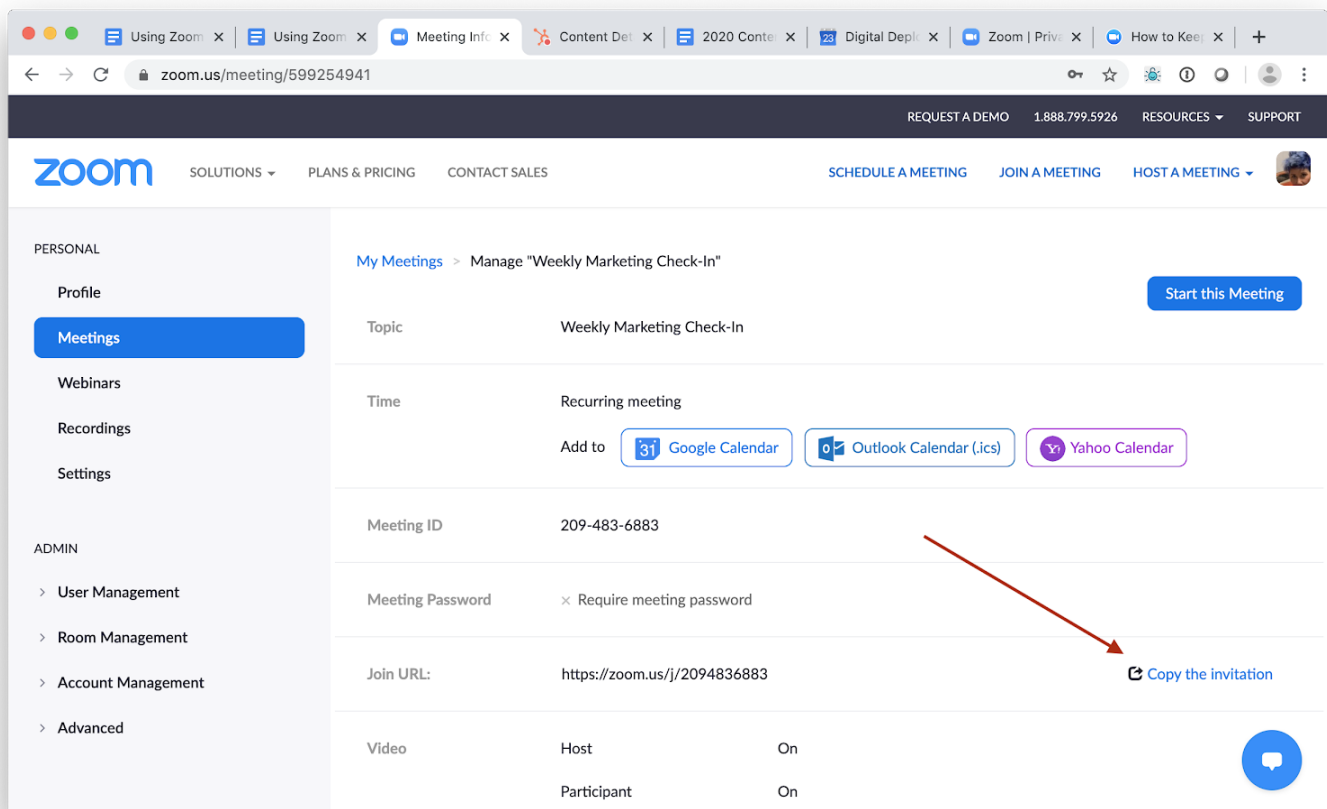
Click **Schedule**.

Now we just need to let people know how to join ... and get a bit of practice in!

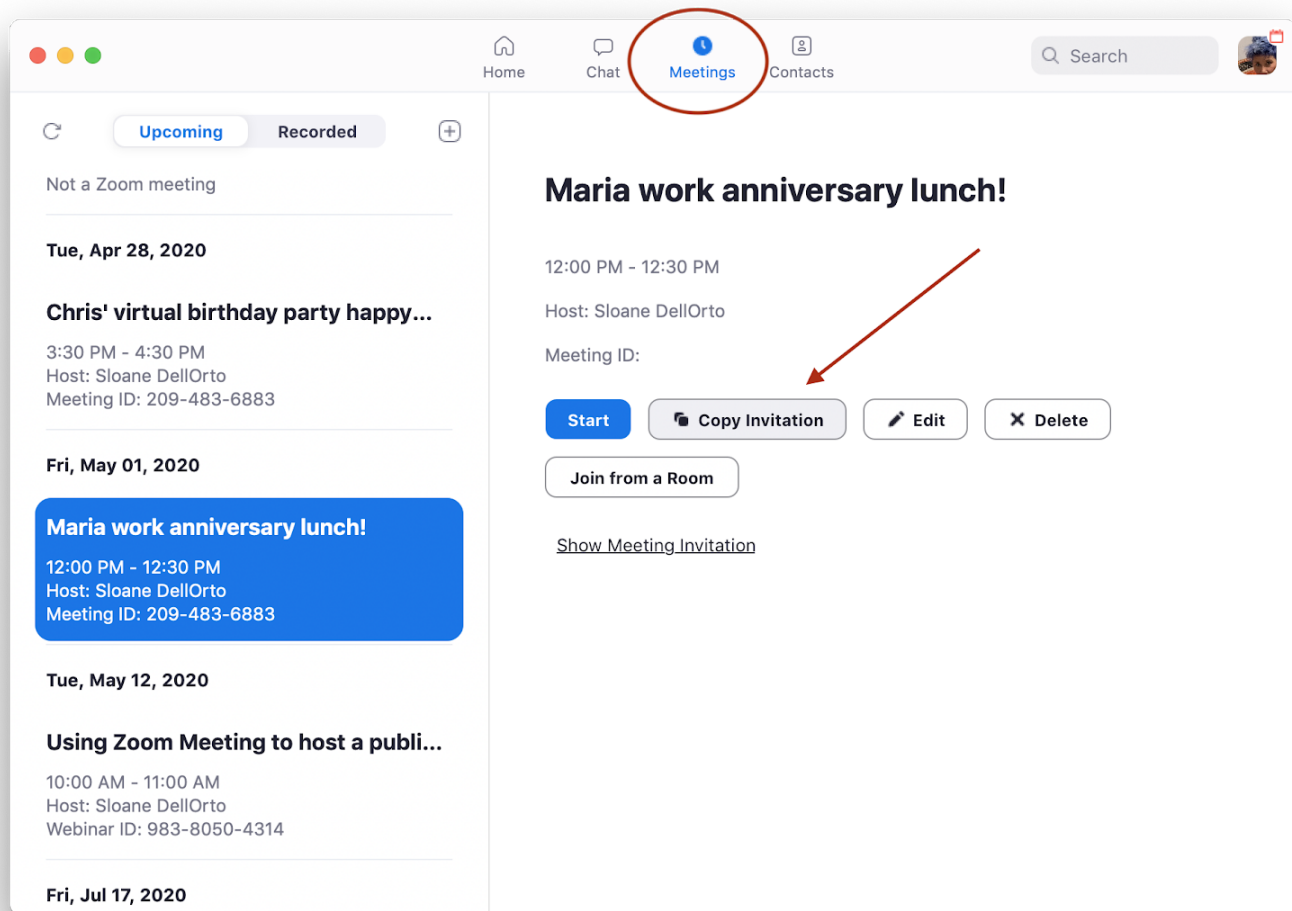
Telling the public how to join and participate

You can get the information you need to share with the public on the zoom.us website, or in the Zoom app.

To get it from your account on the Zoom site, go back to the meeting and click on it to see all meeting details. Part way down the screen, click the link that says **Copy the invitation**:



Or, you can also get that information from the app. Go to the **Meetings** tab, click on the meeting, then **Copy invitation**:



Then go to your software of choice. right mouse click, and choose **paste** - that will give you all the information people need to join either by computer or phone.

In fact, the invitation will have *way too much info in it!* It will look something like this:

You are invited to a Zoom meeting.
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/meeting/tJYld-ytrj8tr_7CZMGkqgUmEF5hZD086w/ics?icsToken=98tyKuCqpjsvH9SRt139a6otW5X5bPG5lmNx_YBnsTjuEidmbybQY-p4FulnRs-B
Topic: Board of Directors Meeting April 23, 2020

Please click the link below to join the meeting:
<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
Meeting ID: 928 055 047
International numbers available: <https://zoom.us/u/abNJv752yV>

Which is really confusing. We suggest editing it to provide **more context and fewer call in options** - something like this (replace with your own *numbers, links and language*):

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 everyone 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 Chat option
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 and the public notified. You can share the same join information with your board and staff, too, as there are only Hosts and Participants in Zoom Meetings (unlike Zoom Webinar, where you also have the Panelist role).

Before you click “Start Meeting”

- 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 meeting 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 the agenda packet file 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. (Or, just put it at the top of your agenda, so that you have less things to share and can do less switching.

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.

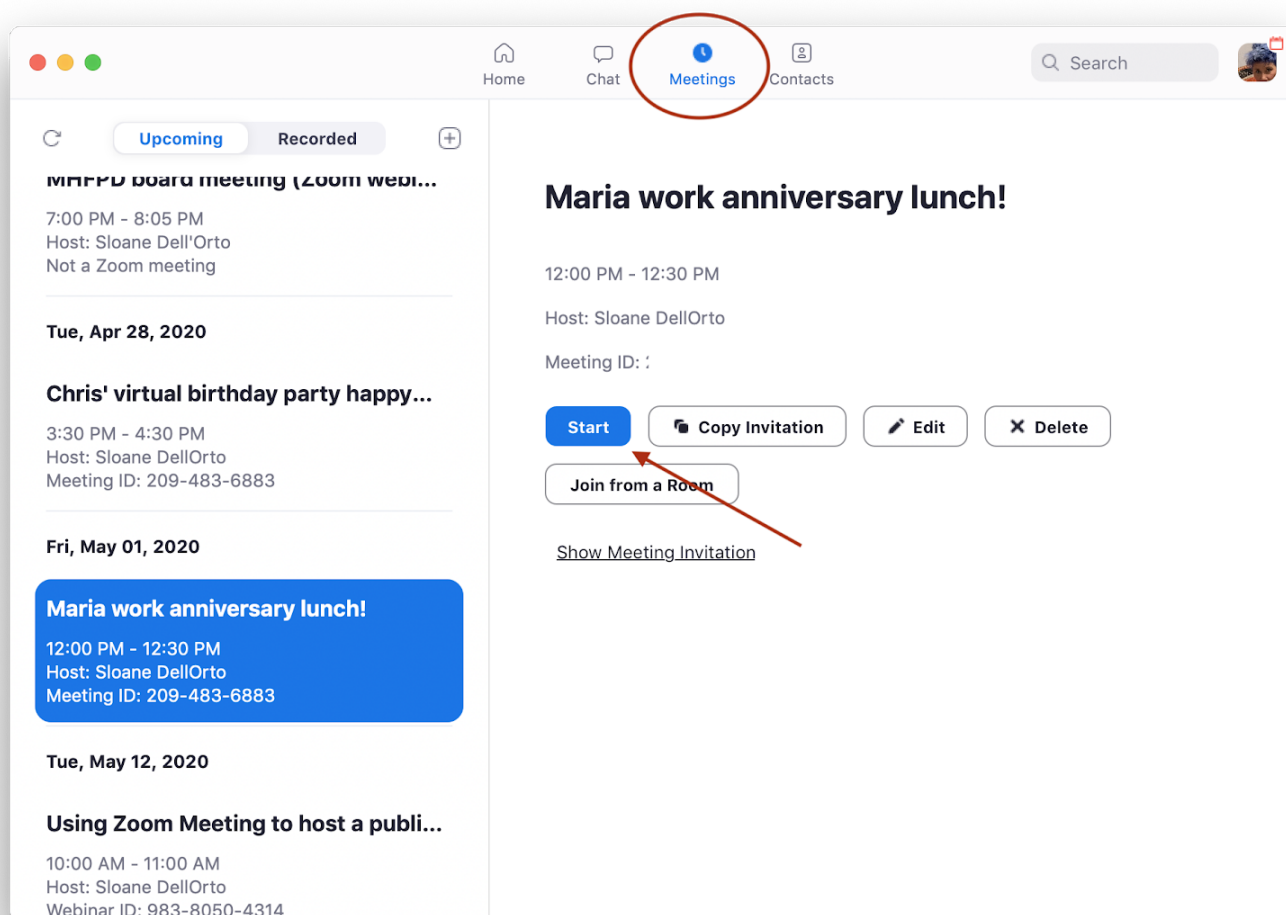
Note: make sure to replace this with your meeting link and dial-in numbers!

Running a public meeting using Zoom Meetings (required)

We suggest that you start your meeting early and ask all of your board / staff to join a bit early, too. That way you can get settled in and feel prepared by the time people begin joining. If you use the Waiting Room feature this is easy to manage, as you can allow people in one by one.

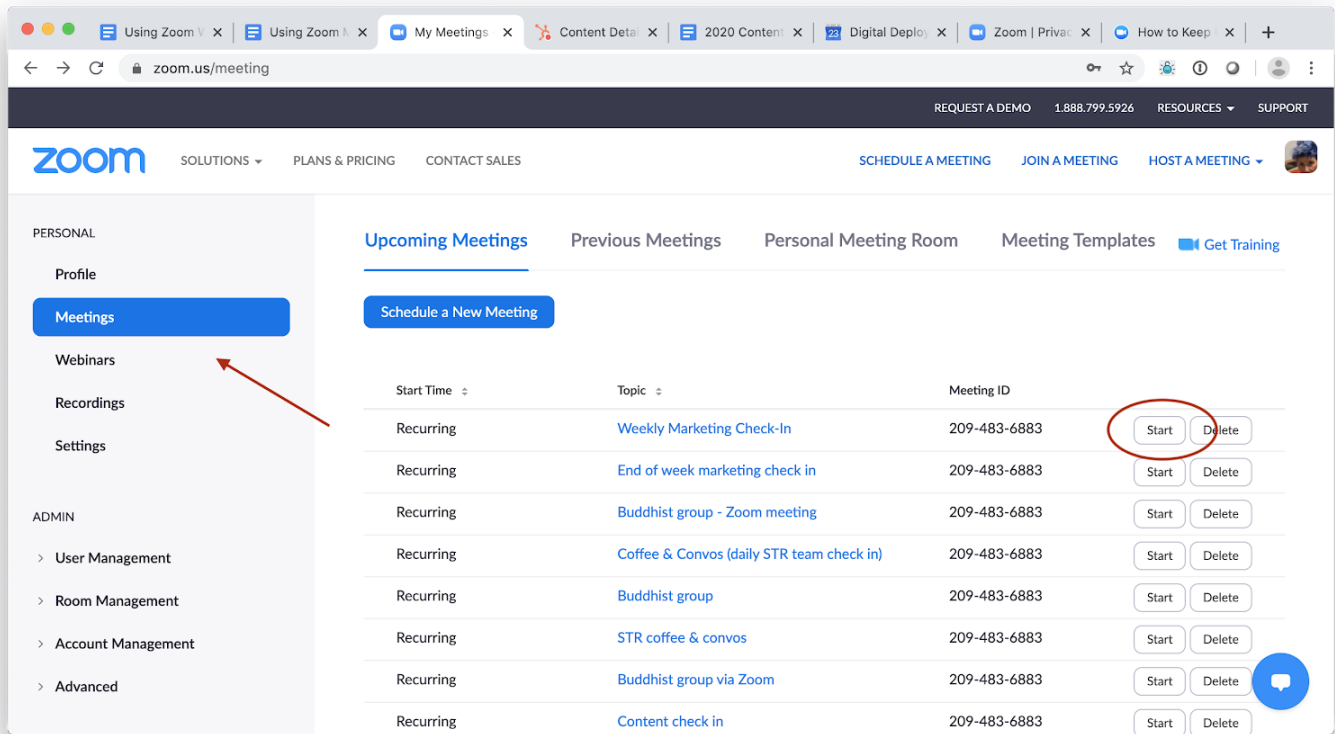
You can start your meeting from the zoom.us website, or from the app. To keep it simple, we suggest you start the meeting from the Zoom app.

To do so, open the app (if you can't find the icon on your computer, you can search for Zoom) and click the **Meetings** tab, click on the meeting you want to start, then click the blue **Start** button:

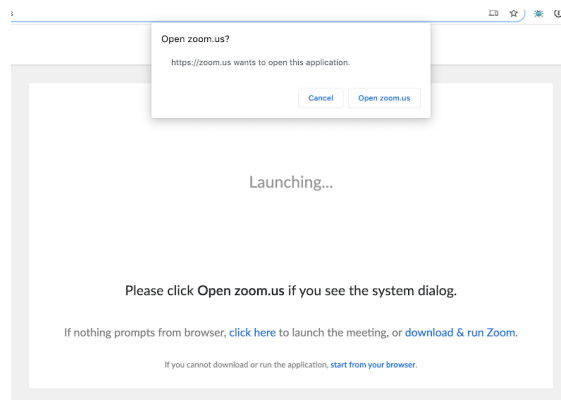


To start the meeting from the website, go to zoom.us and log in to your account, or click on MY ACCOUNT if already signed in.

Click on **Meetings** on the left, then click the **Start** button for the meeting you want to begin:

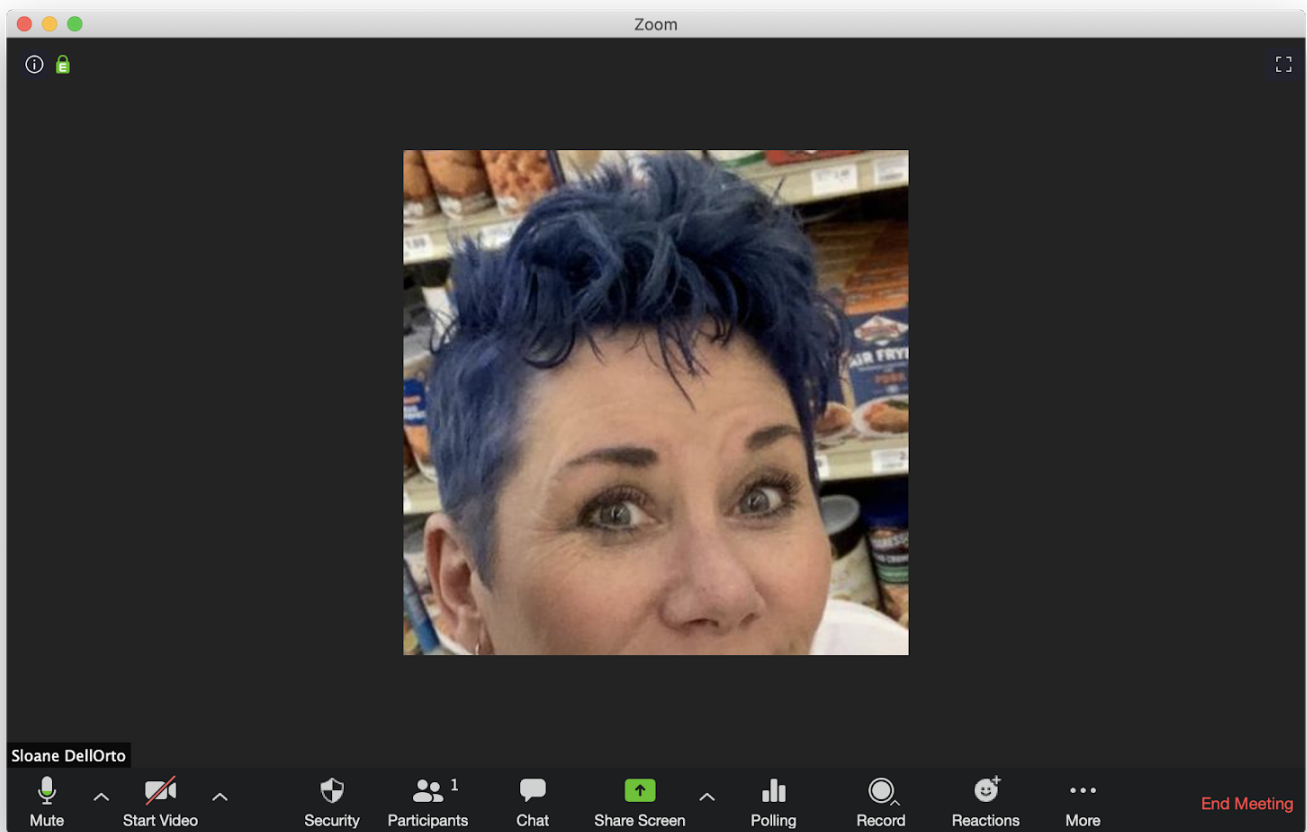


A message will pop up in your browser that says, “Open Zoom.us?” - **you need to click before Zoom will open!** (This is only true if you are starting it from the website; if you’re starting from the Zoom app this won’t happen.)



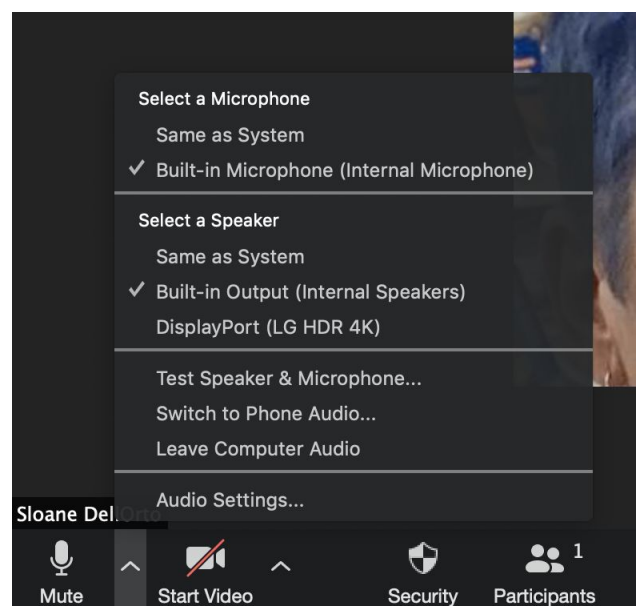
The Zoom app will open (this is not the same as your browser - it’s the app you downloaded earlier in the process). Note: sometimes the Zoom app will not open and it will try to launch the meeting in your browser. This is not recommended. It is very important that you use the application, otherwise your meeting quality will be low.

If your meeting was set up with video off by default, you will see this screen (well, with your picture or name, if you haven't added a profile pic):

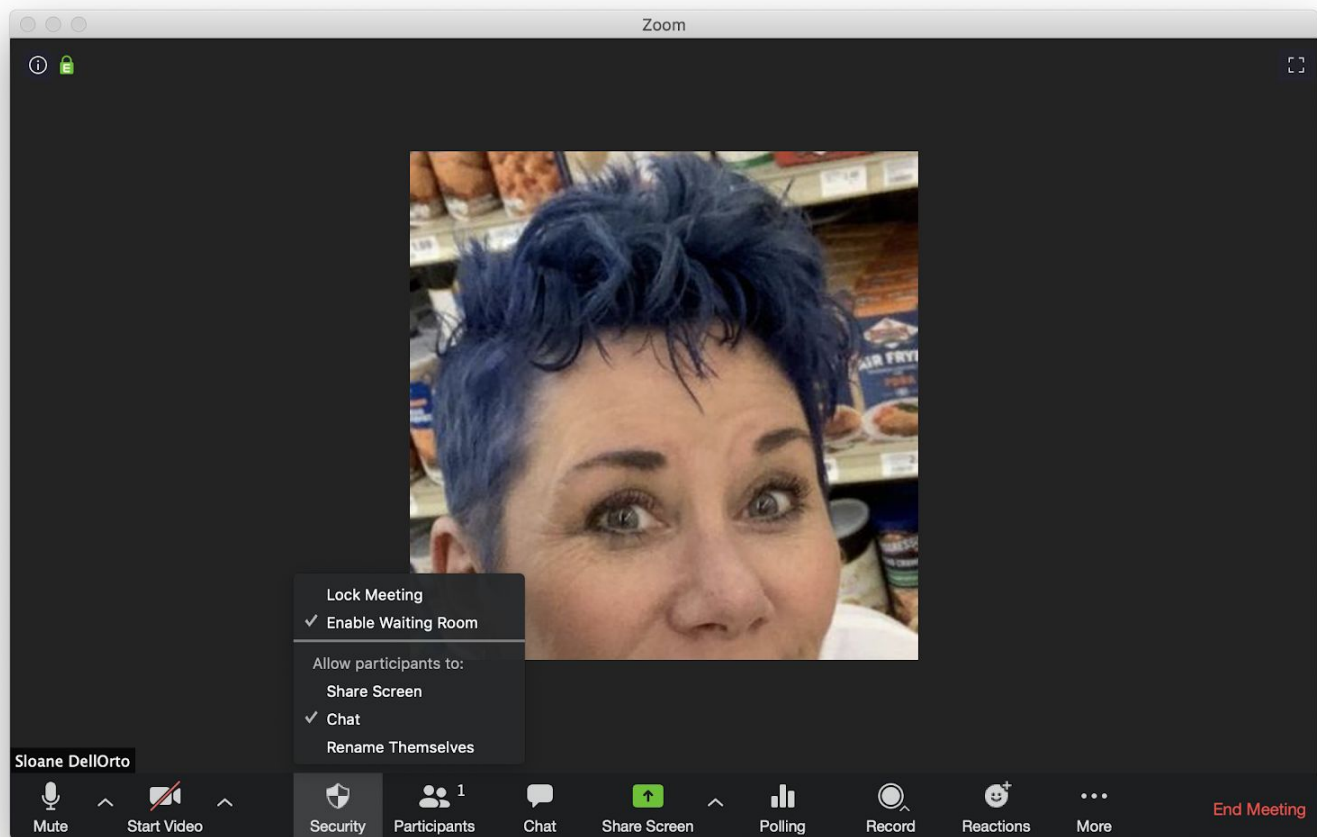


In the lower left, click **Mute** to turn off your microphone (if you have one) while you're getting everything set up and working.

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.



Next, let's check our **Security settings**:



You can enable the Waiting Room feature here, if you didn't when setting up the meeting (more on this in a few...). You can also lock the meeting once everyone is in - this is not suggested for public meetings, but a great option for closed sessions. You can also determine whether or not everyone joining can share their screen, use chat, or rename themselves.

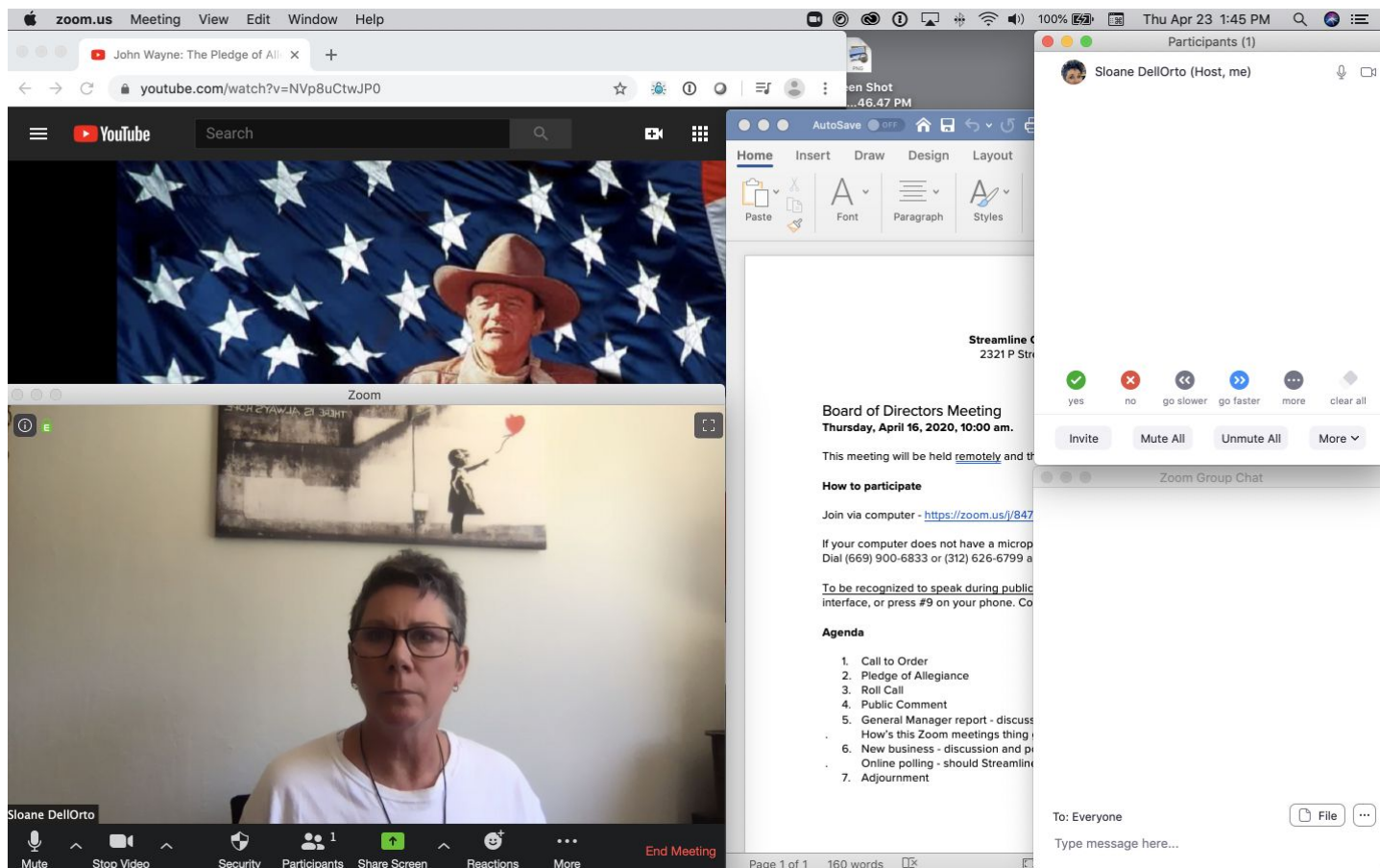
For a public meeting, we suggest enabling the Waiting Room, and only allowing participants to access chat if you will allow public comment that way. (Note that you can add staff or board members as Alternate Hosts if they need to screen share - just have them create a free Zoom Basic account and add them as a host when setting up your meeting.)

Setting up your desktop

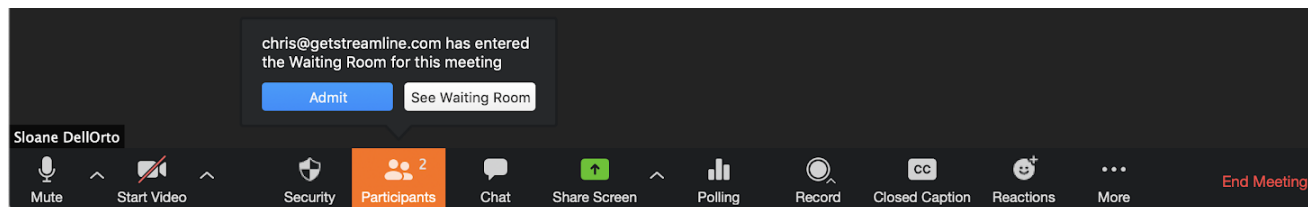
Open the Chat pane if you're going to use chat. You'll keep all of the panes these open during the entire meeting, so arranging your desktop is critical, especially if you are only using one screen - otherwise you will lose sight of something important! You can resize any of the windows or apps, typically by hovering over a corner until you see an arrow, then clicking and dragging to make the window smaller so you can see everything.

Below is a screenshot of the way I arrange my laptop screen if I am hosting a meeting and need to share documents. Note that everything is kind of overlapping, but that's ok - that's **not** how it looks to the public, just to the host. By doing this in advance, it will make it a lot easier to manage everything during the meeting.

Also, close any apps or browser windows you don't need for the meeting, it will keep you from accidentally sharing the wrong content.



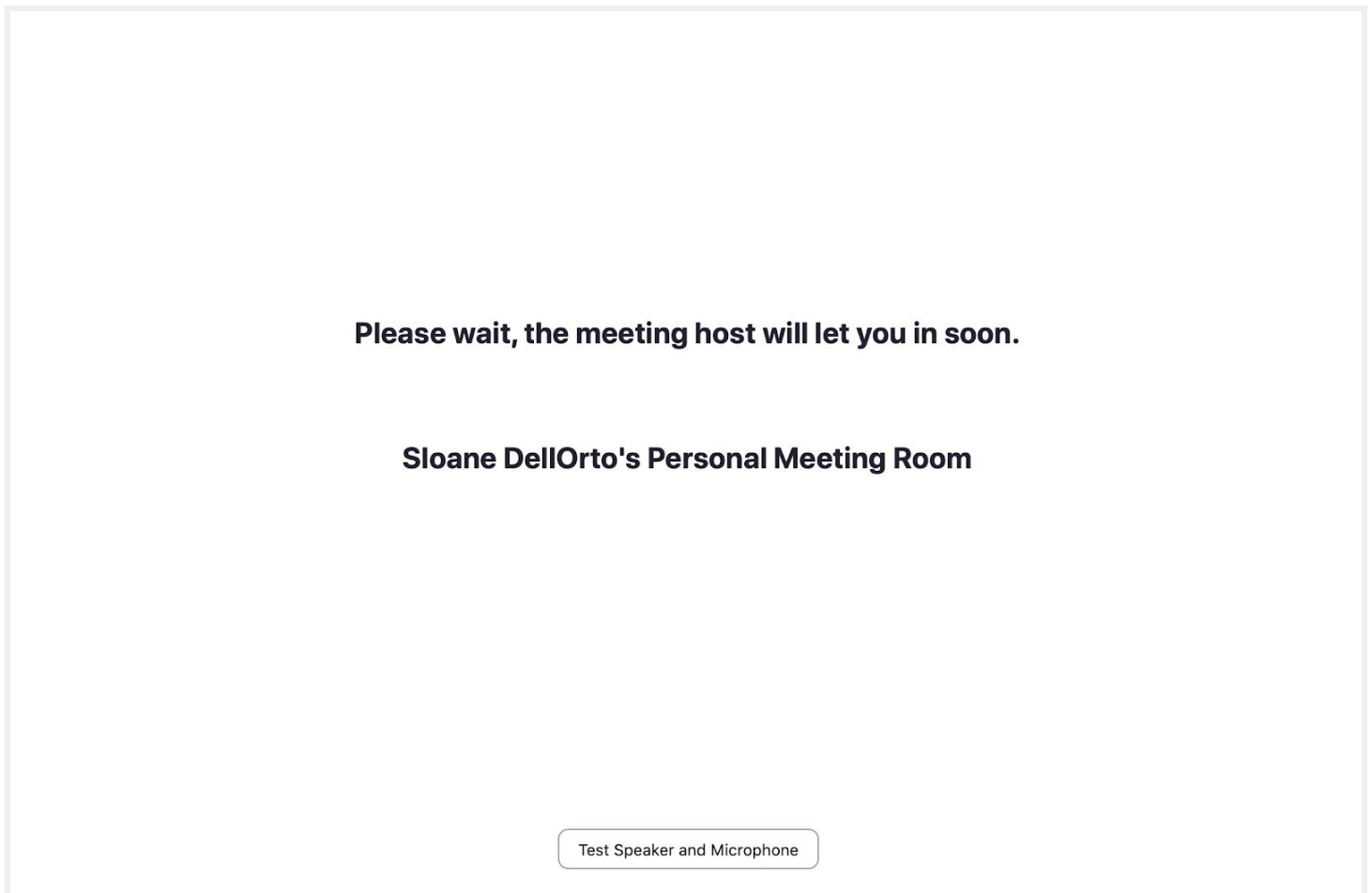
As people join you will get a notification - the Participants button will turn orange:



You can admit them from there by clicking the blue button, but you'll need to have the Participants pane open anyway, so you might as well open it now.

You can admit participants as they enter, or wait and admit them all at once. We suggest that you admit your board and staff one at a time as they join (preferably early!), then once you're ready to start the public meeting you can choose "Admit all" to let everyone else in.

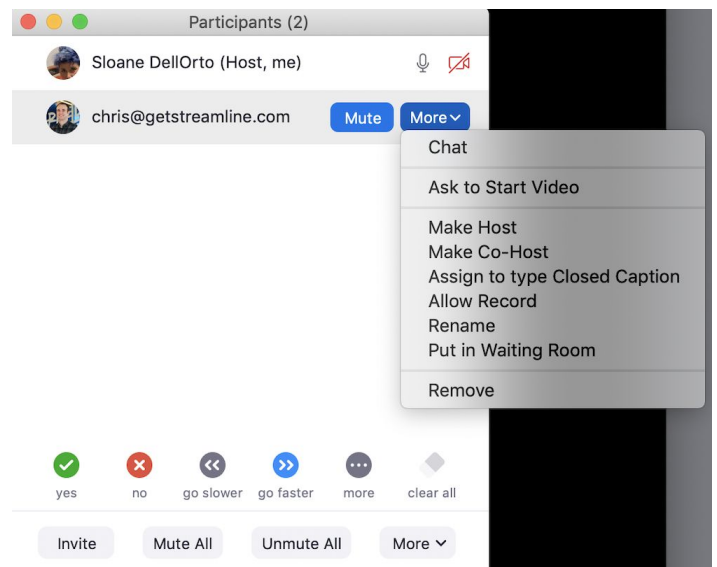
This is what it looks like when you're sitting in the Waiting Room (your text will vary):



Note that you can also put participants back into the Waiting Room during a meeting. It's critical that you understand the controls you have, just in case someone starts misbehaving!

This might also be a good option for agencies that want to open a public meeting, then go into closed session, then come back to the public meeting.

To do so, go to the Participants pane > **More** button for the person you want to send back to the Waiting Room.

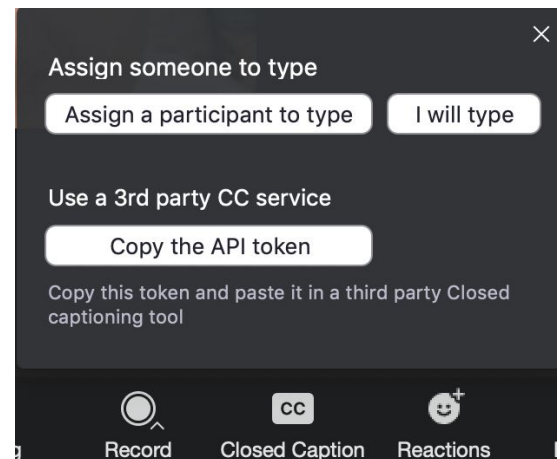


Ok, you're just about ready to actually start the public part of the meeting! Just a few more things you may want to get set up before you start.

Closed captions

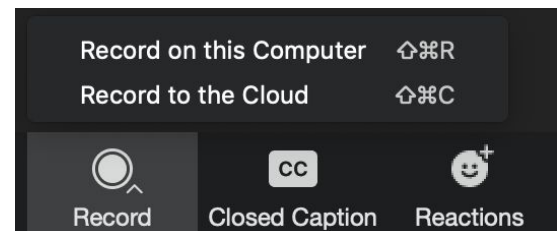
If you enabled this (earlier in the doc) and want someone to add closed captions as the meeting is in progress (for anyone watching who is hearing impaired) you can do so if you have enabled that (see prior info on setting up closed captioning, earlier in this document).

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



Starting the recording

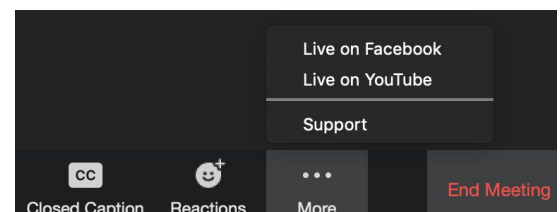
If you didn't set the meeting up to record automatically, but you want to record your meeting when it starts, you can do so by clicking the Record button, then choosing to store the file locally, or in your Zoom cloud account.



Live streaming your meeting

If you want to live stream your meeting, you can find those options under the More button.

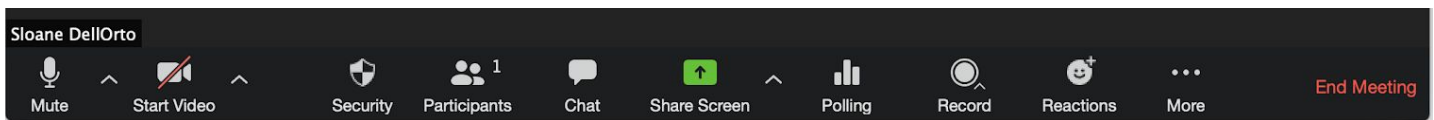
During the meeting, click More and then you can choose to live stream to Facebook or YouTube (or even other sites, if you set it up in your Zoom account settings.)



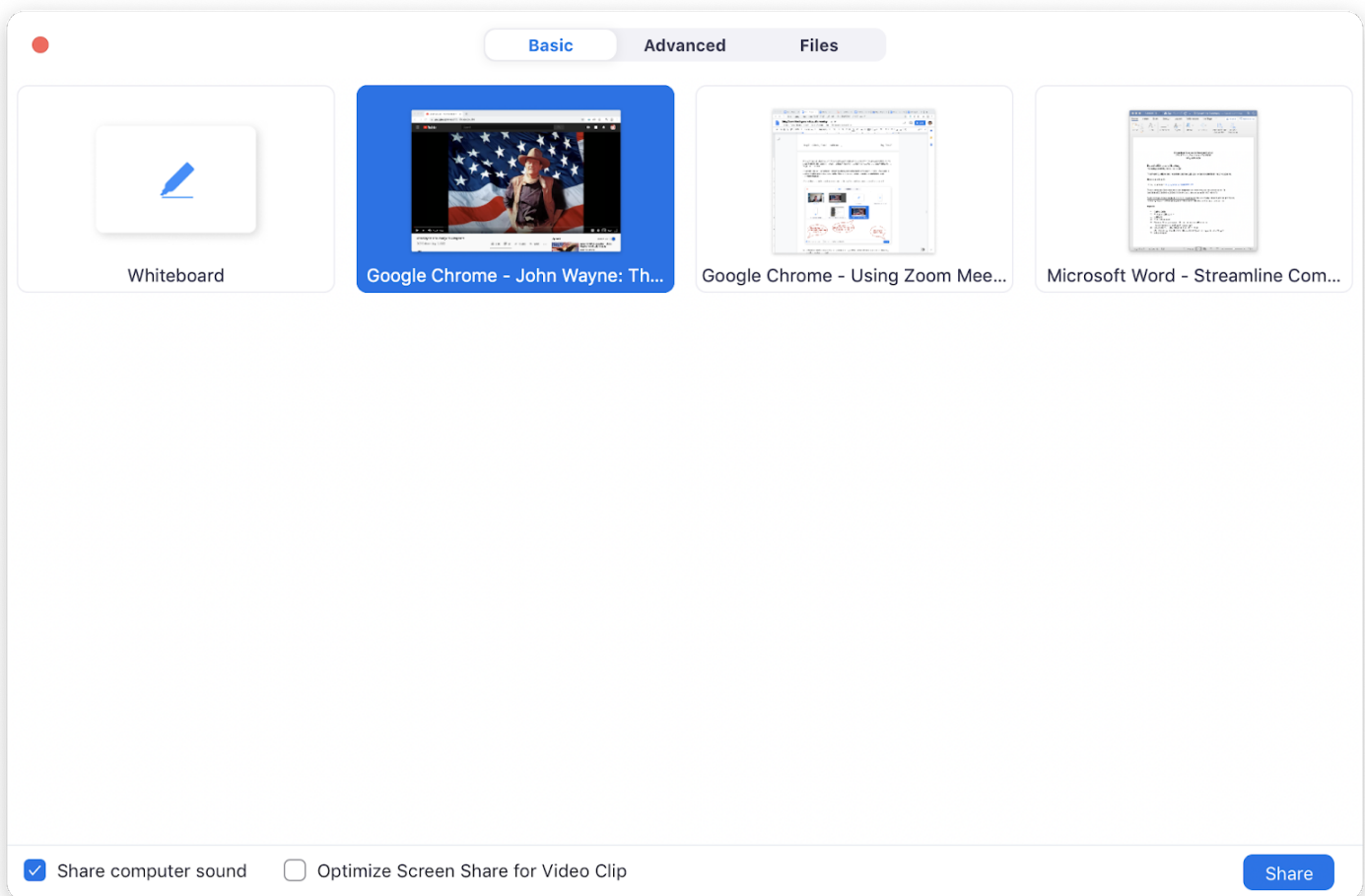
What do you want the public to see, once you let them in from the Waiting Room?

You might want to have the agenda up on the screen, or instructions on how to participate. (Covered earlier in this document.) You might want all of your board members to be on video, too. Whatever you decide, have that all ready before you let folks in.

To share your screen, click the green **Share Screen** button in your Zoom toolbar:



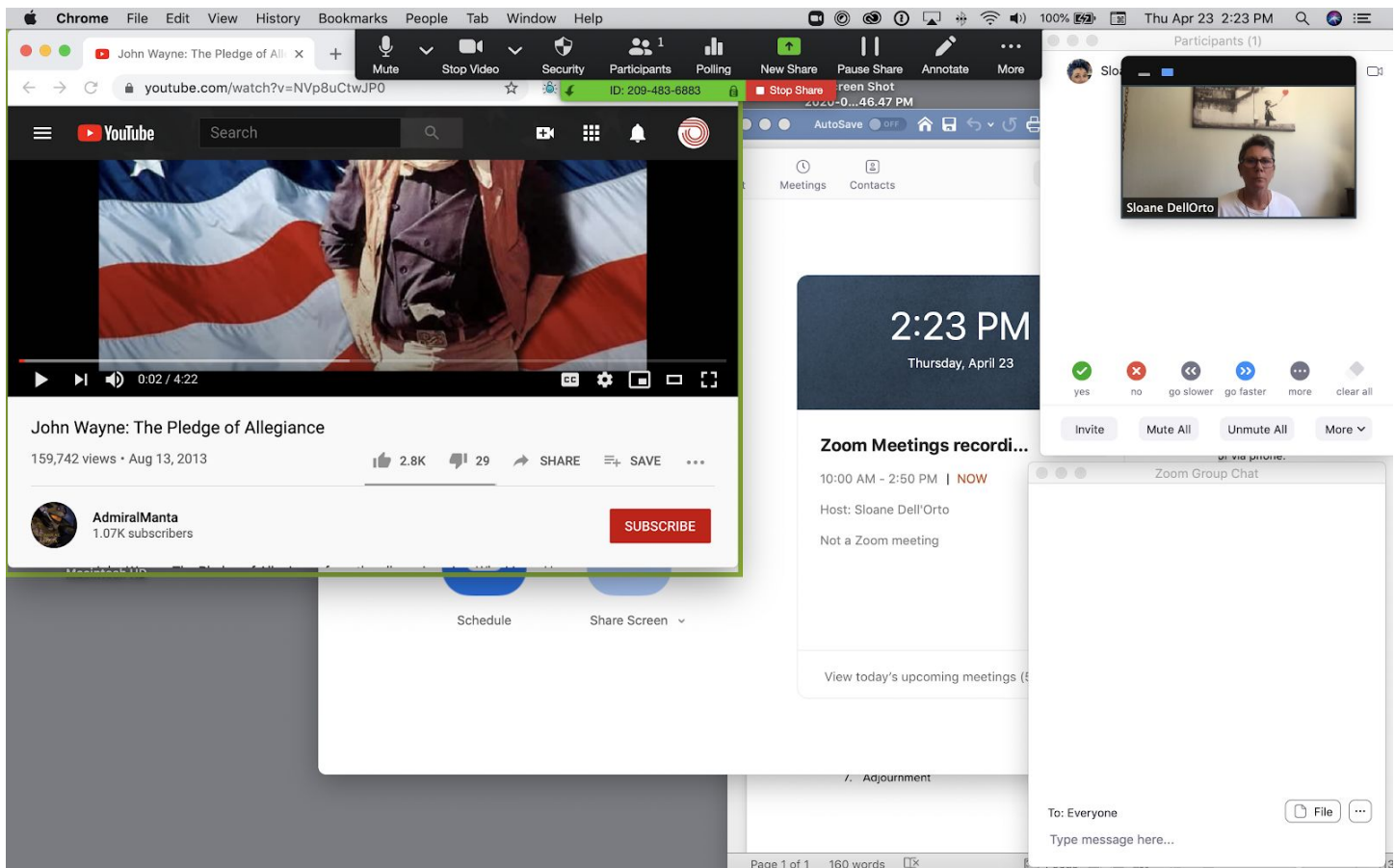
A screen will pop up, allowing you to choose what you want to share. Be sure to click on the item you want to share (it should be blue when selected, like this image).



In the lower left of this screen, check the box that says “Share computer sound” if sharing something like John Wayne reciting the Pledge of Allegiance ... otherwise you will be the only one who hears the sound. If you are sharing a video clip, check that box too. Then click the blue Share button:

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.

You will see a green box around the item you are sharing (it's a bit hard to see in this screenshot, but it's around the Chrome window with John Wayne in it):



A few other things to note: the Zoom toolbar moved to the top of the screen! I have no idea why they do this, but that's what happens. It will go back to the bottom if / when you stop sharing.

Your video(s) become a floating bar that you can move around - if they are covering something important, just click and hold on the black top bar, then move it out of the way.

Lastly, do you see that pesky little Zoom app screen that popped back up in the background? No idea why that happens either, but if it does, you can just click on it, then minimize it.

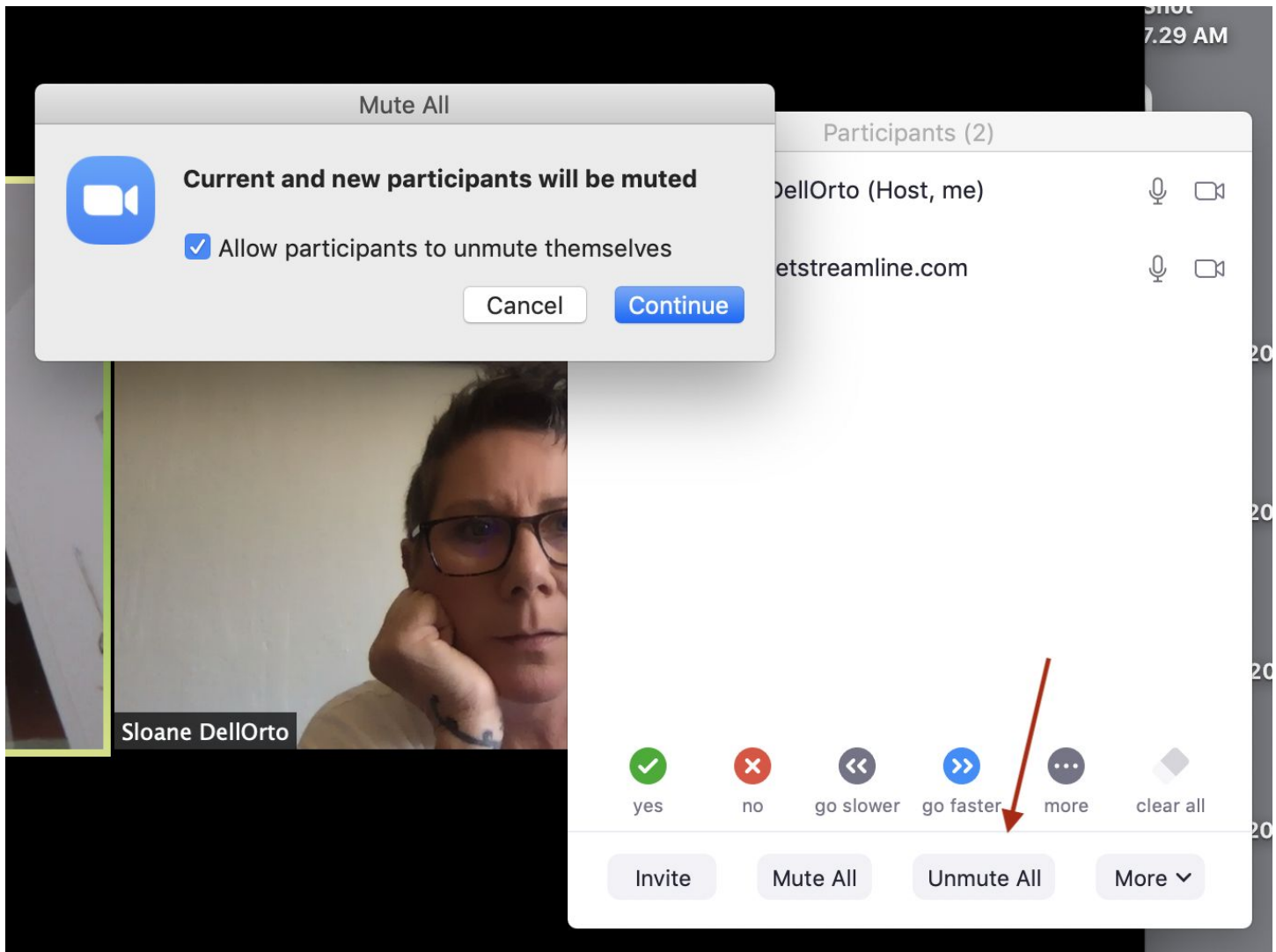
If you need to share a different file (for example, if you first share a document telling folks how to join audio and participate, then you want to share your agenda packet PDF), click on the green **New Share** button.

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

Important controls during the meeting

Zoom has been releasing a lot of security updates, but the truth is that at the start of your meeting, anyone can unmute themselves or start their video. (They can also screen share, unless you've disabled that under the Security button.) This is why using the Webinar add on can be so helpful.

However, if you're going to use plain ol' Zoom Meetings, you do have the ability to mute individuals, or mute everyone. If you mute everyone (button at the bottom of the Participants pane), you can remove their ability to unmute themselves.



Also, you can turn off anyone's video. Once you do, they cannot turn it back on until you send them a request to start their video (also done under the More button on the Participant pane):

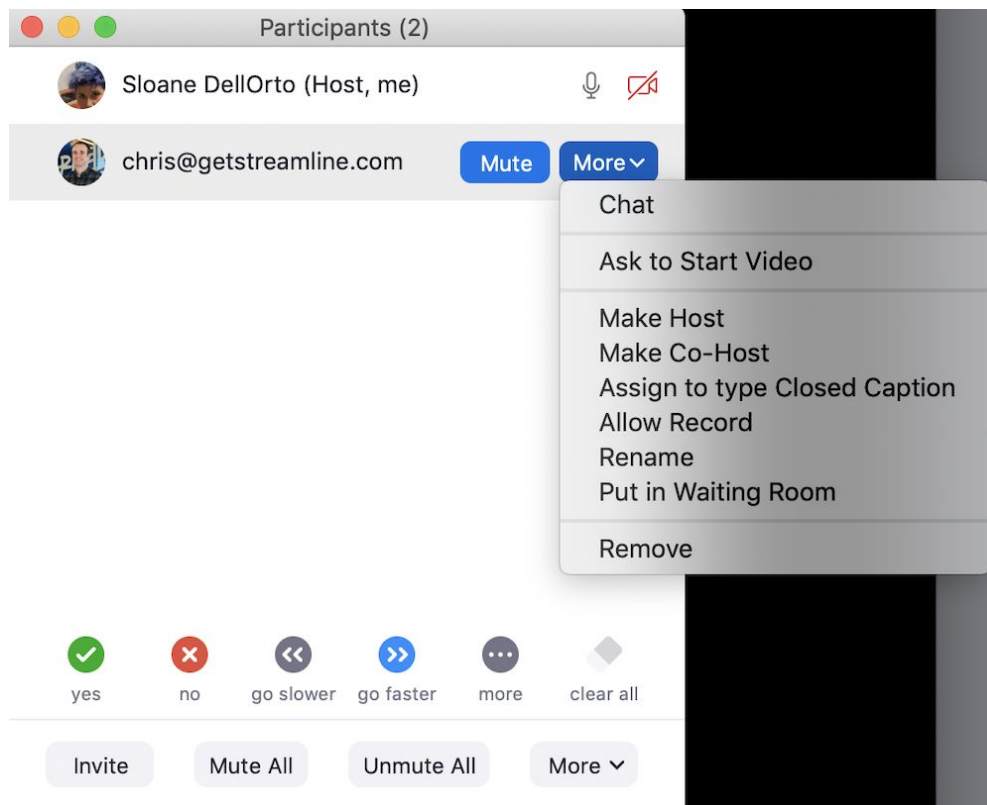


Unable to Start Video

You can't start your video because the host has stopped it

OK

If someone is being truly awful and violating your meeting policies, you can even remove them (last option in the menu under More):



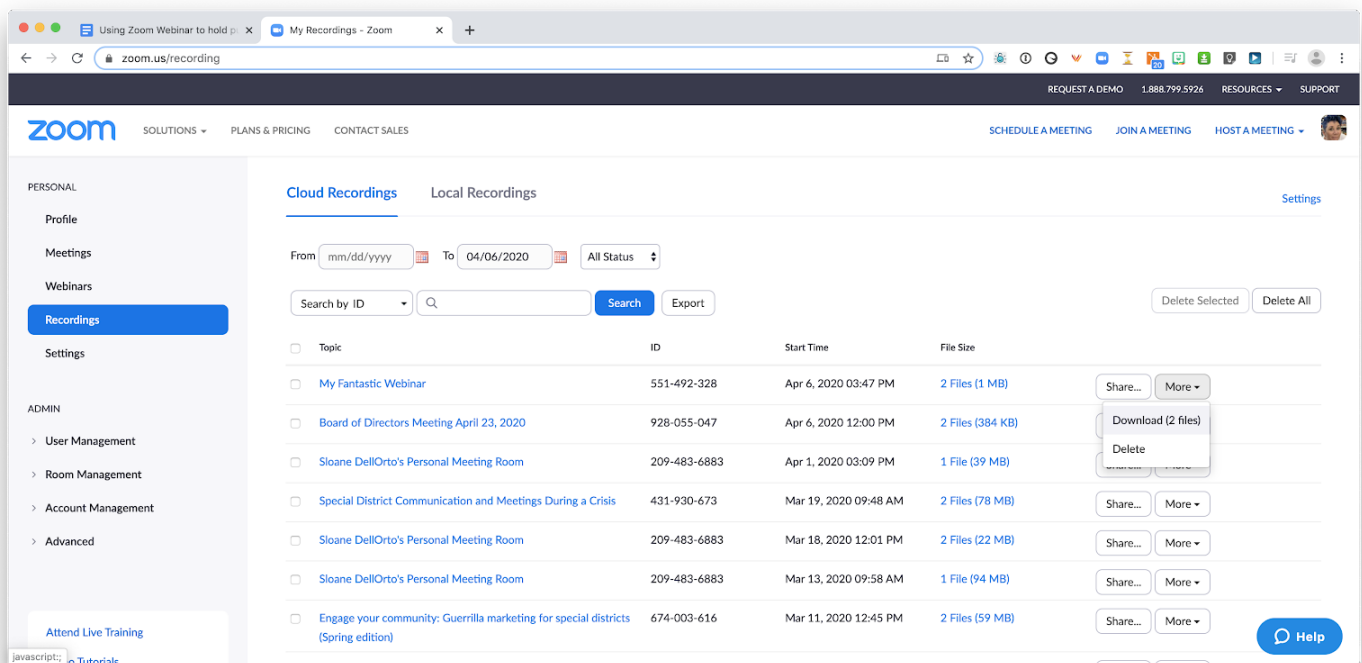
There are more good security tips in this [Zoom blog post >](#)

Tips for holding a closed session (optional)

As mentioned above, you can use the Waiting Room feature for this. Or set up two separate meetings (most secure) and set the closed session meeting up to use a password.

After the meeting (optional)

If you chose to record to the cloud, you will receive an email when the 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:

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sloane@getstreamline.com

