

**DisCO**

Distributed Co-design

# Planning, Designing and Facilitating Online Events with Zoom

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# Planning, Designing and Facilitating Online Events with Zoom





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# Principles for Planning, Designing and Facilitating online events

In our DisCO (Distributed co-design) pilot studies, we proposed a set of principles to work collaboratively in digital environments that are clustered in the three co-design layers of practice: Planning and Facilitating events, and Designing creative interactions. Building on the proposed set of principles, this report presents how to put them in practice using Zoom.

## PLANNING EVENTS

### Define the appropriate distributed co-design approach and the online platform

This involves really thinking about the people in the group that you are trying to engage. It is important to know the number of participants and their technical limitations, and set requirements prior online events (e.g. smart phone or computer). Sometimes you just need to phone call or send text or voice messages to keep a session low-tech, or a combination of them in an asynchronous workshop, to avoid broadband issues.

The platform is analogous of the location of a physical workshop. Sometimes it could be just phone calls, but the online environment is the location where the creative interactions will happen. Some platforms are more appropriate for different size of groups and people. Defining what is right for the context requires studying the technology that people are most comfortable with and then devise bespoke engagement approaches.

### Make clear the expectations of online virtual meetings at the beginning

Start small and try to establish connections: Make people feel comfortable about the virtual environment to let them less worried, concerned and pressured about achieving similar outcomes as physical workshops.

The attention span of participants in an online workshop is shorter than physical workshops. Devising a distributed multiple light touch over a day or week could enable a better way to keep participants engaged in a project.

## DESIGNING CREATIVE INTERACTIONS

### Think about what interactions are needed to enable creative exchange.

The type of interactions affects the flow of the event. Introducing many new techniques in one session could be overwhelming, requiring extra time to allow participants to familiarise with the platform and to respond to tasks.

### Get beyond the screen.

Designing activities that make people move around can introduce physical activities and provide fun. Creating these interactions can provide this sense of fun and more human connection in an online session. For example, you can ask participants to find objects related to the activity you are proposing to help them to warm up for what is coming next and to learn basic online interactions, such as turning on/off microphones and video. Ice breakers and coffee breaks are often used to get to know someone better.

### Design simple activities with tools for remote teams (e.g. google docs, Miro):

You should limit the instructions to simple tasks, such as listing, sorting, highlighting when using interactive tools. Make sure these instructions are visible to participants when they are responding to a task. A programme guide is important to enable better creative online exchange and interactions. This could help to reduce anxiety towards the completion of the task and use of technology (e.g. Miro and Mural have a sidebar showing the steps to be taken in a task). A facilitator in each break out room might be

required to assure participants are doing right.

### Simplify interactions

Avoid multiple interactions at the same time. Breaking down creative interactions in different windows/spaces can help participants in making sense of activities. Assigning participants to small groups can also reduce the number of interactions on their screen. For example, you could instruct participants to use video only for discussion and ask the group to agree on who will do what when generating inputs to avoid confusion.

## FACILITATING EVENTS

### Assign co-facilitators roles to team members (Wing person and technical producer):

In physical workshops, a wing person is the one who gives support to the main facilitator, making sure participants understand task and do it right. They might also be taking pictures, handing over proformas, and observe the session as an outsider. A technical producer or director is the one who creates interactive mechanisms to support online sessions, making sure all the digital material and infrastructure are ready to deploy and assist the main facilitator. Technical producers can plan events to work over a day or a week to support participants in co-designing desired outputs with less active facilitation. During online sessions, the wing person could keep the flow and engagement of participants between transitions while a technical producer can prepare the stage for facilitation. A back-up group can support the communicate between the main facilitator and co-facilitators.

### Role-play the planned ideas

This is similar to designing a creative facilitation approach for a face-to-face workshop, where an iterative process of planning, prototyping and testing a session would support the improvement of the overall workshop. Running through the online event helps to identify the technical nuances and issues that might happen during the event. When testing your online event, invite your colleagues with the appropriate literacy for your session in order to spot things that could go wrong.

### Provide visual cues:

adding cues allow people to navigate easily through the online session by providing points of reference as they work through it. For example, adding a compass to the presentation slide or highlight important parts of it using coloured squares can assist the presenter to indicate an information and enable participants to locate it in the slide, supporting a good flow of the event. Make sure you upload all the materials you will use to keep the event running.

### Use mechanisms to understand the mood of participants

as you will not be able to grasp situation and their body language hints, you can use scales, emojis or creative mechanisms to enable participants to identify their mood during the event. You can explore and encourage the use of the online language, such as Gifs and memes if they are appropriate for the context.

# Planning events with Zoom

Zoom allows participants to join an online meeting via a phone call, dialling a local number. This option (image below) should be enabled when you are scheduling the meeting on the Zoom app or website.

If Zoom is the appropriate platform to run your event, there are some things you should know the platform can do to set up the environment prior the online event.

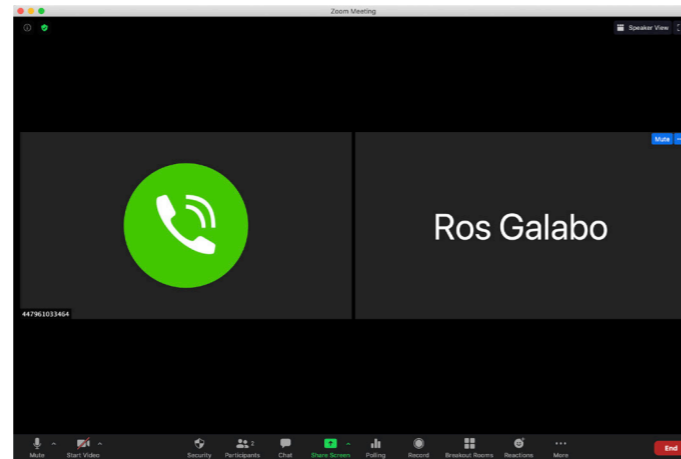
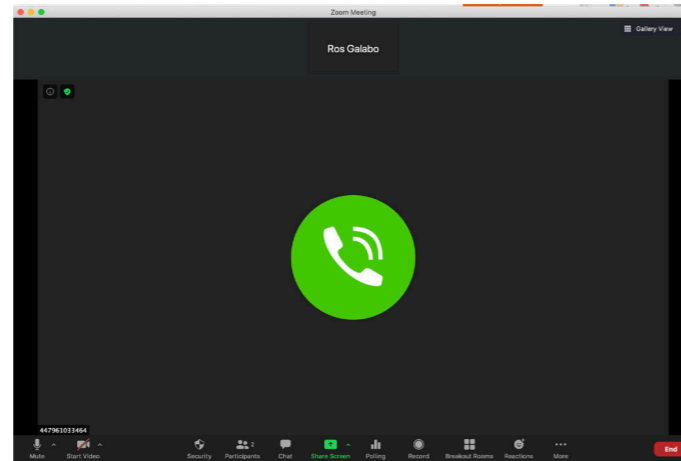
## Going low tech for more accessible meetings

Zoom allows participants to join an online meeting via a phone call, dialling a local number. This option (image below) should be enabled when you are scheduling the meeting on the Zoom app or website.

Participants who decide to join the meeting via phone calls should

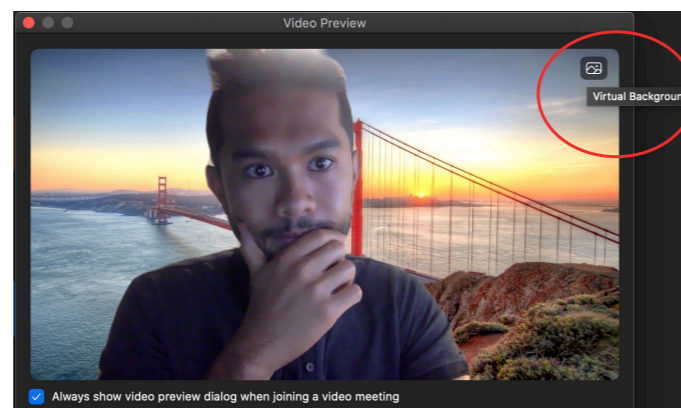
1. Dial one of the phone numbers sent in the meeting appointment.
2. Dial the meeting ID (also sent in the standard invitation) and then press #
3. Dial Participant ID (if they have one), or press # again or just wait.
4. Dial Meeting password (if there is one) and press #

Once they join the call (image below), you can mute and unmute them, and they can unmute themselves dialling \*6.



## Having a shared virtual meeting background

Zoom has an easy way to add an image or video as a virtual background. Once participants join the call, a small window will pop up, showing a button in the top right corner to add a virtual background. When inviting participants to attend an online meeting, you can send a background image in advance to make the environment an even field, more accessible and more equal or to identify members of a group.

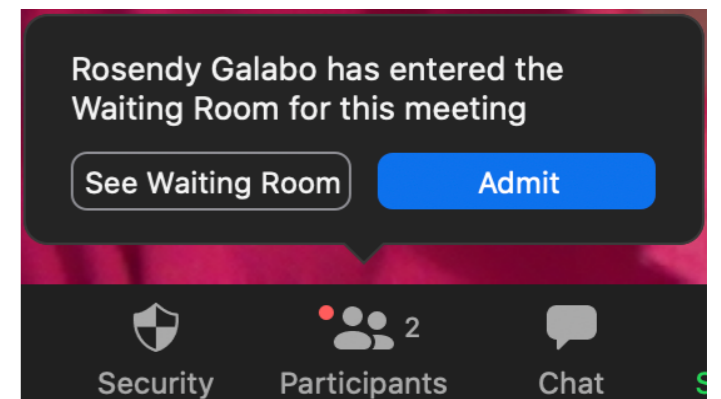
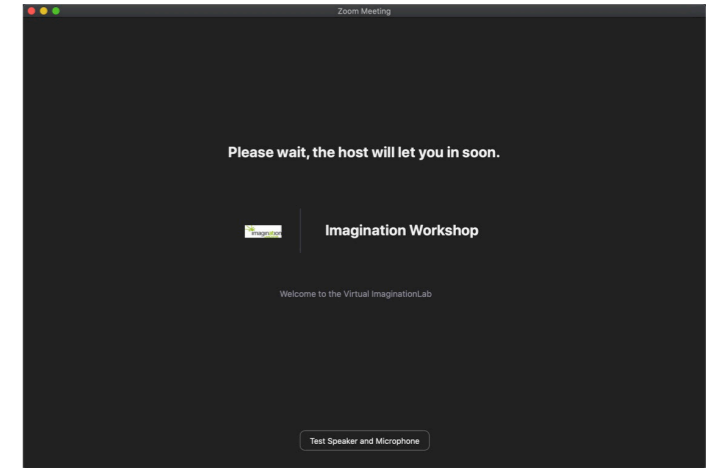


## Allowing participants to join the meeting before the actual start

Often in meetings, conferences, and workshops, the interactions with people that you make the cup of tea during coffee breaks and ice breakers are when you really get to know participants and their organisations.

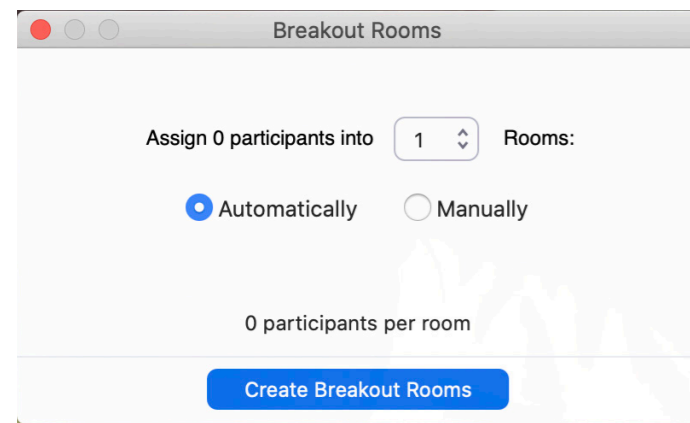
As a host, make sure to start the meeting before the actual start, and welcome every person who joins it. You can enable waiting rooms when scheduling a meeting on the Zoom app or website, so you admit each invited person to the room and greet them individually. You can use this time to make clear the expectations of the online meeting, get to know participants and build trust with them, taking things beyond the screen.

You can create temporary breakout rooms (see page 10) for those who have joined earlier, so they can have some time to talk with each other, while waiting for the session to start to avoid multiple interactions at the same time.



# Designing creative interactions with Zoom

Zoom allows a few interesting interactions due to its focus on video conferencing features, and therefore, it requires external apps to enable more creative exchange, such as Google docs, Miro, Mural. Knowing the features that zoom can do can enable the design of more creative conversations. The most interesting features are breakout rooms, polling, and annotate tools. Make sure to keep your interactions simple.

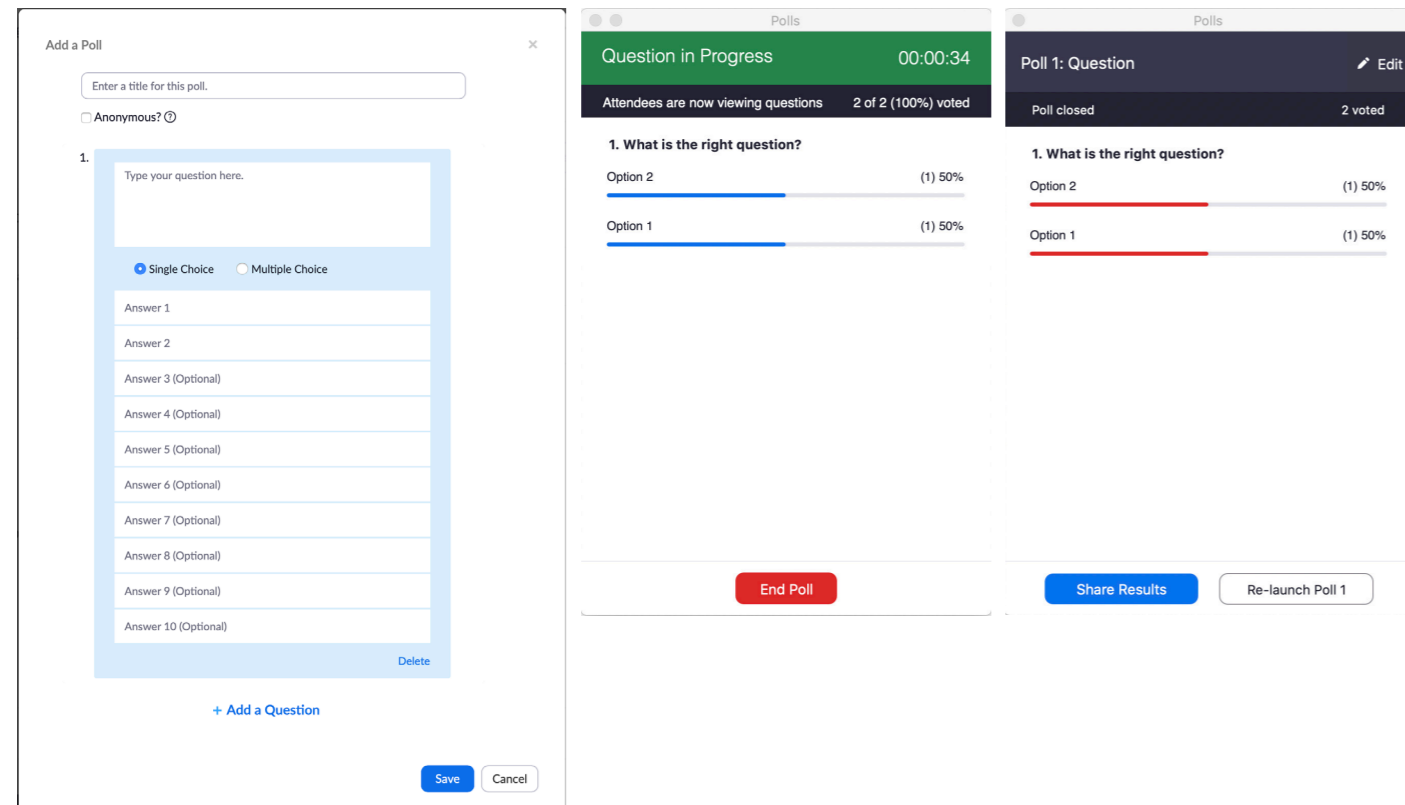


## Creating breakout rooms

Zoom allows the host to assign participants to breakout rooms without requiring them to have technical knowledge to join different rooms. The host can set up a specific closing time or can manually close all rooms. Once participants are assigned to breakout rooms, the host can move participants to different rooms.

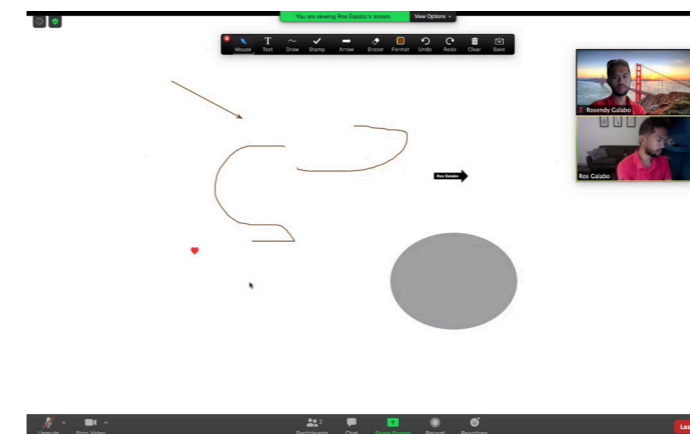
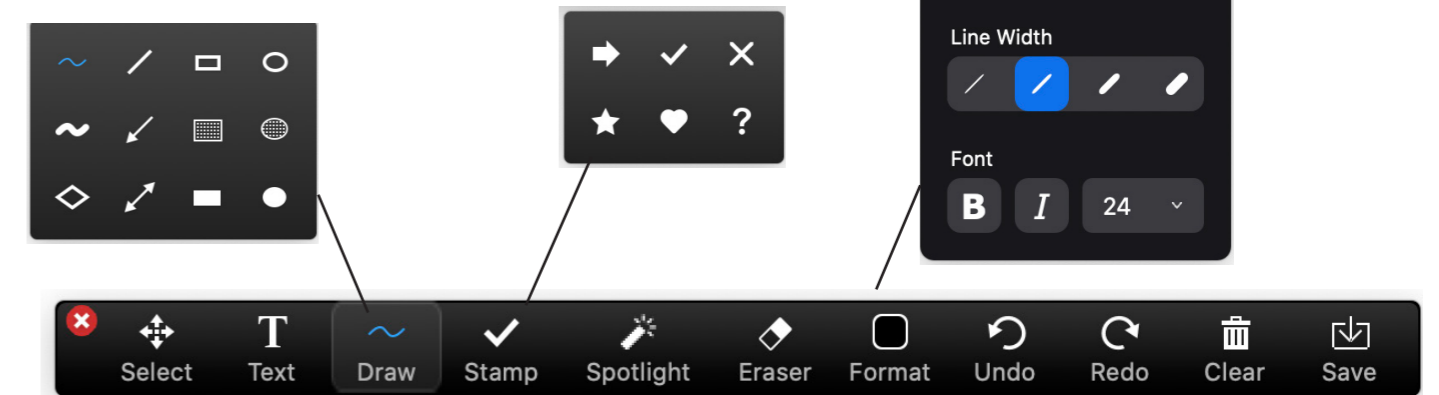
## Polling

Zoom allows the host to create and launch polls, and share results

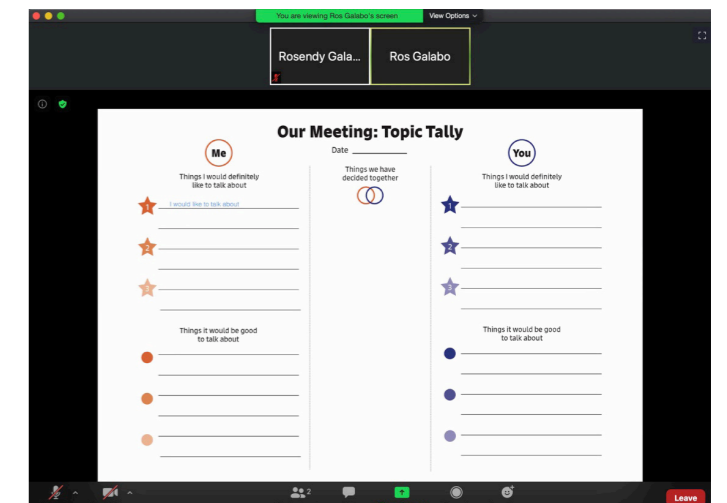


## Annotation tools for shared whiteboard and screen

When sharing a whiteboard or your screen, participants can be allowed to take notes in a collaborative way on a shared screen/whiteboard. Only the host's mouse cursor is visible to other, which helps to present an information without the need of additional visual cues.



You can take notes on a blank page



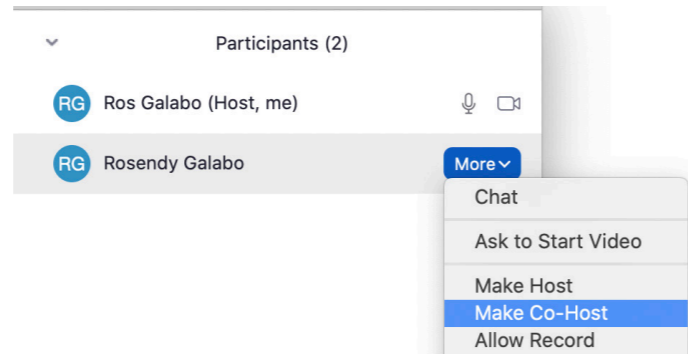
or use a shared image as a background and take notes

# Facilitating events with Zoom

When facilitating online events, assigning tasks to your team can help you to deliver a good session. Having team members dedicated to manage the mediating technology and support participants in need of assistance can make sure the session will run smoothly. To overcome the lack of visual cues, asking participants to use mechanisms (reactions and non-verbal communications) and creating a back-up group (e.g whatsapp, organisers' breakout room) can improve communication between participants and organisers. Furthermore, you can also spotlight a participant's video to reduce distractions and fatigue. These mechanisms for communication and assigning team roles to support an online event are available on Zoom and should be integrated within the facilitators' approach.

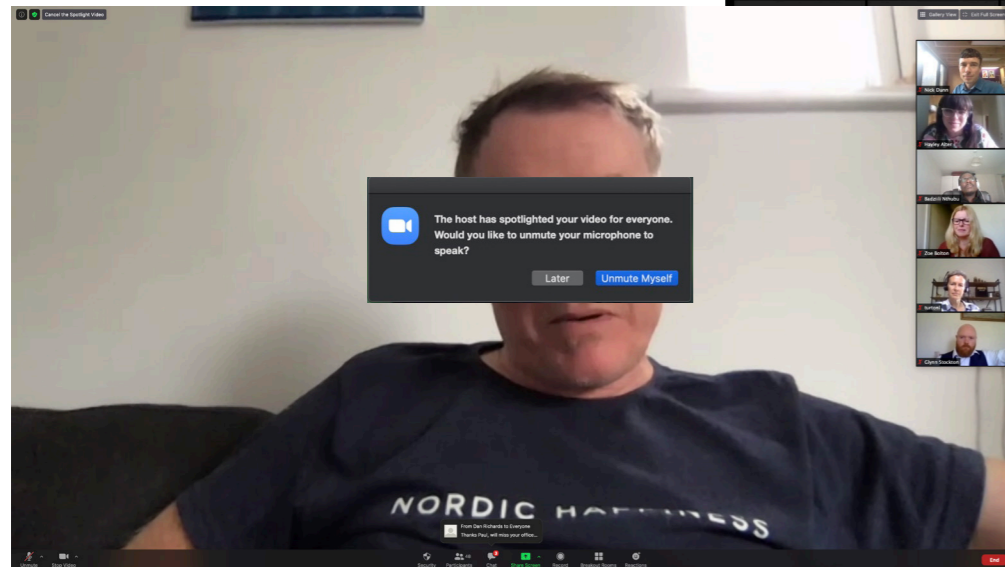
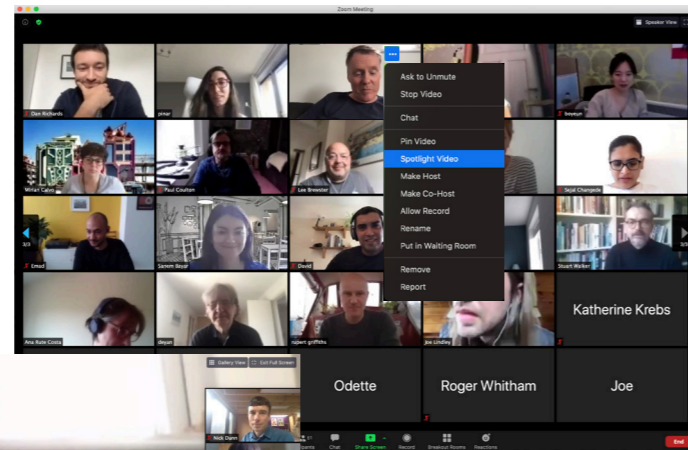
## Assigning co-hosts

Co-hosts can join different breakout rooms, but cannot create, assign or move participants to different rooms. They can also admit participants, mute everyone, spotlight a participant's video (see below), launch polls and share results, but cannot create polls.



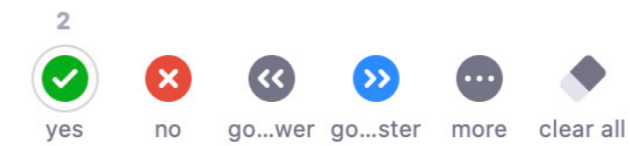
## Spotlighting a participant's video

Spotlighting a participant's video can reduce distractions and fatigue and draw attention to someone who is presenting something important. This is similar to handing over to someone or turn taking that occurs in face to face conversations.

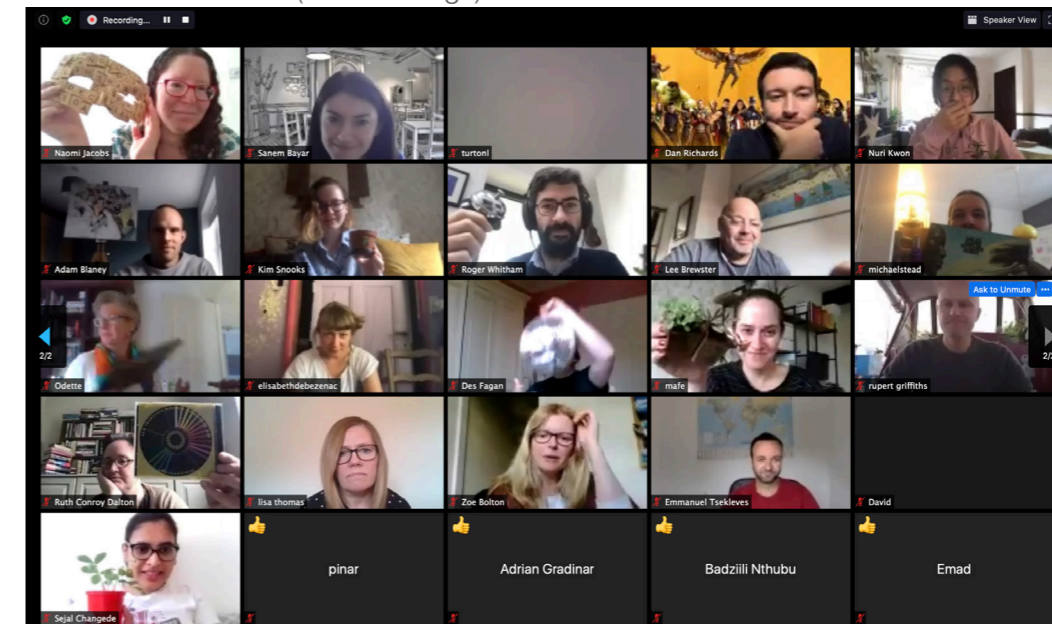
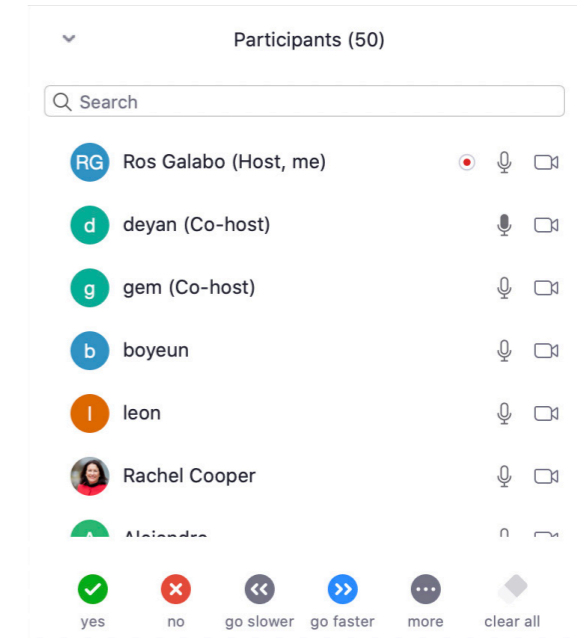


## Using mechanisms to understand mood: Reactions and non-verbal communication

When presenting or facilitating an online meeting, ask participants to react to your questions using emojis such as thumbs up, or using non-verbal communication tools in the participants panel, such as or raise up your hand.



Only hosts and co-hosts can see the number of non-verbal communication reactions (top image), and only participants can raise their hands (right image). However, everyone can see reactions (bottom image)



Reactions