**Technical Basics for Convening and Moderating**

**Face-to-Face National Issues Forums Online**

This document focuses on some of the tips we have discovered while using Zoom in practice forums. It is not an endorsement of a platform; we hope these tips will apply to most platforms.

Note: “Co-host” can be interchanged with “Co-Moderator”

When [scheduling a meeting](https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings), consider taking some security precautions, such as requiring a password; creating a [waiting room](https://support.zoom.us/hc/en-us/articles/115000332726) that allows you to only admit registered participants; limit screen sharing to you and a co-host.

Yes, have a co-host! Moderating a forum requires you watch people’s faces, watch for hands being raised, manage turn-taking, asking deliberative questions, etc. Your co-host can manage things like muting and unmuting people, [screen sharing](https://support.zoom.us/hc/en-us/articles/201362153-Sharing-your-screen) slides with selected issue guide slides on it, showing the starter video, etc. The host assigns a co-host during the meeting. [Enabling and adding a co-host](https://support.zoom.us/hc/en-us/articles/206330935-Enabling-and-Adding-a-Co-Host)

NIF Starter Video. When sharing a video, note there are check boxes that indicate “Share Computer Sound” and “Share Video.” The co-host should check these boxes to achieve the best sound and video quality. [Optimizing a Shared Video Clip](https://support.zoom.us/hc/en-us/articles/202954249-Optimizing-a-Shared-Video-Clip-in-Full-Screen)

Mute – If people are not muted there can be a lot of background noise. But if people are muted they may struggle to unmute and join the conversation. Before the forum starts, talk through the basics of how to mute and unmute. The co-host can help by muting someone with a lot of background noise.

Chat – The chat can be a useful feature or it can be a distraction. Some people may wish to post resources in the chat, but others can engage in side conversations using chat. If that’s happening they are not attending to the others in the room. (It’s a lot like texting during a meeting.) The chat can also be used by someone who has technical issues that the co-moderator may be able to address. Set your ground rules for the use of the chat in the beginning, just like you discuss mute and how you want people to take turns.

Hand-raising – Zoom has a hand-raise function. We recommend just asking people to physically raise their hands, otherwise the moderator has to watch the screen and the chat box (which you may have to do anyway – but keep it simple!). Others take turns using the chat box, but the same dilemma exists. Just like in physical space, invite people to embody hand raising!

Video – If someone does not want to use their video all the dilemmas of knowing when they want to enter the conversation apply. Encourage video if at all possible! When setting up your own video, try to set the camera so it is close to eye level or a little above. Many cameras are on top of the monitor. If your camera is off to the side, no one can see your face. Try to be close enough to the camera so people can see your facial expressions. If you are too far away, they will miss a lot. If you can encourage the same from your participants, all the better. Avoid having a bright light behind you; you will just be a silhouette.

Audio – Headphones with built-in microphones (including earbuds with built-in mics) are a great way to improve sound quality and limit background noise. Consider using them and invite others to as well, especially if sound quality is poor.

Gallery View – In Zoom calls, the participants can see everyone on the screen at once, like in the Brady Bunch TV show. A 4 x 4 set of squares, each the same size. To set the screen to gallery view, there is a “button” in the upper right-hand corner of the screen. If you see the speaker only, click Gallery View. We recommend Gallery View so the moderator can watch the entire room at once.

Recording – If you choose to record the forum, let the participants know and the purpose of the recording. They will need to know if it is only for your own research or if it will be shared in some way. There are ways to change the name in the window to anonymous and have no picture in the window, but this action defeats the purpose of the face-to-face Zoom. You need to decide if you want people to participate as “anonymous” or if recording the forum is more important.

Bandwidth – Hold the Zoom Room in an environment with good bandwidth. Some participants may have poor bandwidth and their voices or videos will stagger or pixilate. They can improve their bandwidth by turning off their video. Invite them to rejoin the room in a few minutes to see if things improve. Turn off other devices in the home that also use bandwidth.

Finally, the [Zoom](https://support.zoom.us/hc/en-us) website has TONS of information on using Zoom.

Public Agenda has put together a useful document that goes into great detail about moderating on-line forums. Take a look if you wish. <https://www.publicagenda.org/wp-content/uploads/2018/05/Taking_The_Conversation_Virtual.pdf>.