

Open Space Online Using Zoom: Checklist

This document was last updated 25 June 2020

WHAT'S HERE: TOPICS CATEGORIES & CHECKLISTS

PLANNING THE EVENT

SOCIALIZING THE EVENT

CONFIGURING THE EVENT

DELIVERING THE EVENT

PROCEEDINGS

ADDITIONAL INFORMATION

PLANNING THE EVENT

Determine the day and time of the event

Select a Facilitator and additional helpers

- A backup Facilitator in case the main Facilitator experiences technical problems

- Helpers to capture screen shots and post them in the session documents

- Helpers to facilitate capture of session notes in the sessions

- ZOOM PRO and BASIC users for scheduling meeting rooms

Determine the number and lengths of the sessions

- ZOOM meetings scheduled by BASIC users automatically end after 40 minutes

- ZOOM meetings scheduled by PRO users are not limited

Determine the maximum attendance for the event (ZOOM charges extra for > 100 per meeting)

The event schedule includes items specific to online events

- Introduction to technology (ZOOM, meeting rooms, session documents)

- Continued technology introduction as people arrive

- Scheduled breaks (optional)

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Open Space Online Using Zoom: Checklist

What to include in the Proceedings

SOCIALIZING THE EVENT

Select an event registration provider

Configure the event registration

How long to keep registration open?

Post-registration message including technology guidelines

Custom url for the registration page

Support multiple currencies

Get the time zone right in all materials

Publicize the registration page on social media

CONFIGURING THE EVENT

Determine the number of meeting rooms (allowing buffer for overflow)

Acquire enough ZOOM users to schedule meeting rooms

One PRO user for each meeting room PLUS one PRO host each for main room, lounge, hallway, etc.

One PRO or BASIC user for each session meeting room

Schedule ZOOM meetings with appropriate security settings like these (or better)

Disable Screen Sharing and Annotation

Mute participants' audio & video upon entry

Main room – do NOT enable join before host

Additional meeting rooms (lounge, hallway, etc.)

One per session meeting room – enable join before host

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Create Session Documents

Participants

Notes for each potential session (session meeting rooms * number of time slots)

Closing

Overview for Facilitator –links to all meetings and session documents and the marketplace

Create virtual Bulletin Board

Include ZOOM link to the main room, and each of the other meeting rooms

Include links to the Participants, Closing, and each Session Notes document

Send two links to the Sponsor – the ZOOM Main Room meeting and the virtual Bulletin Board

Sponsor sends final reminder to all registrants

ZOOM Main Room meeting link

Join from your own computer so you can move freely among the sessions

Tech introduction & check will begin before the event

Have light in front of you so that we can see you instead of your silhouette

Reboot your computer shortly before joining the event

DELIVERING THE EVENT

Facilitator materials are ready and in the order they will be needed

Event schedule – printed in 16pt type or larger

Index cards for visual instruction

Index cards as reminders for the Facilitator

Text document containing

Key links including the Bulletin Board, Participants document, Closing document

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Blocks of text for Facilitator or tech helpers to paste into the ZOOM chat

Configure your ZOOM display

Open the Chat and Participants windows

If audio or video become choppy, switch to Speaker View

Start the Main Room 30 minutes before the published start time; remain muted with video off

At 15 minutes before the published start time, enable audio and video; say “Hi” to who is there

Periodically review ZOOM instructions as people arrive

At the published start time, welcome the attendees, state your intent to spend a few minutes with tech introduction

Formal welcome by the Sponsor around 5 minutes past the published start time

During the Opening Circle

Capture screen shots showing all attendees (for the Proceedings)

Reveal the Bulletin Board

Paste the Bulletin Board link into the ZOOM chat

Instruct people how to access the Bulletin Board anonymously

Stress the importance of

Using the Bulletin Board ONLY from a computer

Avoiding clicking on any icons that will have undesirable results

Invite people to post session proposals on the Bulletin Board

As Bulletin Board activity subsides, invite additional topics, and ask each convener to walk the board and introduce his/her topic

Encourage Marketplace negotiations to happen via private chat

Adjust the start times on the Bulletin Board as necessary

Send the participants off to the sessions

Facilitator continues to HOLD SPACE IN THE MAIN ROOM throughout the event

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Tech helpers monitor the Bulletin Board and adjusts the format if necessary

During the Closing Circle reveal the Closing Circle Session Document link

Paste the document link into ZOOM chat

Invite everyone to record their reflections simultaneously

Watch in amazement as the closing comments emerge – BE QUIET as people type

After the document activity subsides, thank the participants and ask if anyone would like to unmute and offer additional reflection

PROCEEDINGS

Allow participants to edit the session documents for a stated period of time, perhaps 1-2 hours

Stop sharing the documents after that time has passed

Download Participant, Session, and Closing documents

Capture additional content for the Proceedings (invitation, promotional website materials, etc.)

Combine all Proceedings content into one PDF document with a table of contents

Email the Proceedings to the Sponsor

Sponsor publishes the Proceedings and notifies the participants

ADDITIONAL INFORMATION

Mark Sheffield and Daniel Mezick created this checklist based on several years' experience producing online Open Space Technology events. These events include public events and private ones inside commercial organizations. This checklist was created in June 2020. You may contact us at:

Mark Sheffield: mark.sheffield@triadtechnologysolutions.com

Daniel Mezick: daniel@selfmanagementinc.com

Also see Open Space Technology Using Zoom - Guide and Checklist
<https://openleadershipnetwork.com/onprogress/OnlineOstUsingZoom>

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