

The following information was compiled in April 2020 and will be periodically reviewed for accuracy.

Zoom Meeting Tips for Board Meetings with Executive Sessions

In the Zoom web portal, make sure the following features are enabled:

- Co-host [\[Zoom's how-to\]](#)
- Waiting Room [\[Zoom's how-to\]](#)
- Note: Signing in to the web portal gives you access to settings that affect how all Zoom meetings function. These settings are not accessible in the desktop app.

Schedule and start Zoom meetings through the Zoom desktop app.

- Signing in through the app is simpler if you are just going to schedule or start a meeting.
- When scheduling a meeting, select the Meeting ID option of “Generate Automatically” instead using of your Personal Meeting ID (PMI)
- Reserve use of your PMI for Zoom meetings with trusted colleagues (i.e. not public meetings).

Suggested workflow for executive session

- After you’ve started the Zoom meeting, participants will be put into a “waiting room” until you let them in.
 - Zoom also lets you add members to your account, which will allow them to bypass the waiting room. Contact Technology Services if you would like more information.
- As key staff join the meeting, make them co-hosts so they can help manage the participants, as well as assist with operating the Zoom meeting.
- As other participants join the meeting, make sure everyone is clearly identified. People connecting over the Web will have the ability to set their name, but phone callers won’t, so you or the co-host(s) will want to rename those participants accordingly.
- Call the general meeting to order.
- When you go into executive session, public participants will need to be put in the waiting room. In preparation, let them know you’ll be in executive session for an approximate amount of time, and they’ll be allowed back in after it has ended.
 - If additional participants want to join while you’re in executive session, they will be put into the waiting room as well. If you want to prevent additional participants from joining, you can lock the meeting, but this may be seen as unnecessarily prohibitive.
- When executive session has ended, let the public participants back into the Zoom meeting.

Other tips

- Example: [Oregon City School District's board meeting on Zoom](#)