USING ZOOM FOR DIGITAL SCHOOL BOARD MEETINGS

A GUIDE FOR PENNSYLVANIA SCHOOL DISTRICTS
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This guide is created by the Pennsylvania School Boards Association (PSBA) to support public school entities in transitioning their school board meetings from a physical location to the digital video conferencing platform, Zoom. Zoom also offers a robust guide to its webinar platform which is available for viewing at the following link: Getting Started with Webinars. Zoom also offers a step-by-step guide for scheduling and customizing webinars which is available for download by clicking here.

This guide is organized into four sequential steps for transitioning a school board from meeting physically to meeting digitally: assess, plan, test and launch. The guide embeds recommendations from PSBA as well as links to Zoom-created tutorials on specific actions or topics. This guide may be useful for districts transitioning to digital platforms other than Zoom although specific settings and options may not have counterparts on alternative platforms.

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**Step 1: Assess**

**Assess Team**

Every district has a team of people who are involved in planning and executing school board meetings. This same team will need to be informed about how their roles change and remain the same in a digital environment. We suggest one additional role to what every district currently has, a Zoom webinar host. We recommend that this role is not assigned to the board secretary, board president or superintendent who already have responsibilities within the board meeting. Instead, we recommend someone from district staff with an aptitude and familiarity with technology and Zoom in particular to be the designated Zoom host to run the platform and troubleshoot any technical issues that may arise for school directors or public attendees during the meeting.

The following is a summary of responsibilities of those running a smooth and compliant board meeting:

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board Secretary/Temporary Board Secretary</td>
<td>calls roll, monitors presence of a quorum, takes minutes, monitors BoardDocs</td>
</tr>
<tr>
<td>Superintendent</td>
<td>provides necessary documentation, updates, and makes recommendations to the board</td>
</tr>
<tr>
<td>Board President</td>
<td>chairs the meeting according to board policy on Parliamentary Procedure (006)</td>
</tr>
<tr>
<td>Zoom Host</td>
<td>runs Zoom platform and manages related devices by muting/unmuting speakers, troubleshooting any technology/platform issues that arise during the course of the meeting</td>
</tr>
</tbody>
</table>

There may be others who are helpful to this effort. After reading through the accessibility and accommodations section of this guide, you may decide additional roles and staff are necessary.

**Assess Technology**

PSBA recommends that school directors and district administration use district-provided devices and accounts when possible. This addresses some security concerns and allows district staff to more effectively support and troubleshoot technology issues that may arise.
The following questions could begin an assessment of current technology capacity as well as any potential challenges to be addressed in transitioning to a digital meeting on Zoom’s platform.

- Do your school directors and administration have district-provided devices with internet access, microphone and speaker capabilities?
- If not district-provided, do individual directors each have mobile phones, tablets or computers with these capacities? What is known about these devices and their capabilities?
- Do school directors have an email or access to BoardDocs platform in order to receive a digital version of the board packet — agenda, documents and information needed for deliberating and voting on board business at the meeting?
- Do school directors have an appropriate location where background noise or other interference can be minimized and nothing inappropriate will appear in the background of their video image?
- Does your platform for complying with the notice requirements of the Sunshine Act have capacity to provide a link to the Zoom webinar?
- Will your community have wireless or other internet access to join the meeting and submit public comment? If not, could the district provide a wireless access point that provides access while still adhering to state health and social distancing guidance, or has the district identified other community locations that have wireless network availability that adheres to social distancing guidance?

As of April 20, 2020, PSBA is offering full-year Zoom licenses for every member school district and Career and Technology Center. If a district is interested, indicate by filling out the survey at paschoolsready.org. In partnership with CM Regent Insurance, PSBA is providing an Enterprise Licensed Educator Account with access to Zoom Webinars and Zoom Meetings. Further training on the Zoom platform is offered through PSBA; members can access by logging into their membership portal.

For more information on the benefits of this license, please see this Zoom resource: Account Types.

Assess Timeline

Once district leaders have assessed both the human capacity and technological capacity for this transition, a timeline for planning, testing and implementation should be created and communicated to the team, including the board. Remember your requirements for public notification and listen to the team and board for any scheduling delays or mitigating factors that may cause delay.

Also consider the meeting time frame when assessing your timeline and preparing to provide public notification of the meeting. Zoom and other online meeting and livestreaming platforms are experiencing unprecedented volume of network traffic based on the current social distancing guidance; starting your meeting on the half-hour or other increment may result in fewer technology glitches and dropped meeting connections.
**Step 2: Plan**

**Zoom Webinar or Zoom Meeting**

Your Zoom license through PSBA in partnership with CM Regent Insurance offers the option to schedule a Zoom Webinar or a Zoom Meeting. Note the key differences in Zoom’s own chart (left).

To see a full comparison of features, visit the following Zoom resource: [Meetings vs. Webinars](#).

For school board meetings, PSBA recommends using the Zoom Webinar format to allow for school directors and district administration to be designated as “panelists” which offers more control in participating in the meeting than those in the public audience who are designated as “participants.” Participants can only participate in the webinar meeting when granted access by the Zoom host.

The PSBA provided Zoom licensing limits active participants in a webinar to 100 and active participants in a meeting to 300.

For districts who need to reach a larger public audience, livestreaming offers that option. Zoom allows webinars and meetings both to be livestreamed. PSBA recommends that if districts choose to livestream through another platform (like Facebook or YouTube), district leadership consult with their information technology (IT) staff and any policy regarding acceptable use of technology to ensure those platform settings follow district practice and policy. PSBA recommends that comments be turned off on livestreaming platforms that allow them and offer that option. This way the public is not commenting on the livestream expecting to have a response and the comment section does not become a distraction to the livestreamed meeting. The purpose of the livestream is to widen opportunity for the public to view the meeting, not to provide an alternative and unlimited comment window.
To set up a livestream option for your board meeting in Zoom, please click the following link for a step-by-step tutorial: Livestreaming Meetings or Webinars Through a Custom Service.

To see the overview of Zoom-defined roles in a webinar and roles defined for meetings, visit the following links: Roles in a Webinar and Roles in a Meeting.

The following are several important features you will want to consider when deciding to use Zoom Meeting or Zoom Webinar.

**Zoom Meeting**

- In Zoom Meeting, participants are more difficult to manage because each has control of muting/unmuting themselves at any point. The Zoom host could remove participants, but with 300 participants, both those who do not understand how to navigate the platform and those who are looking to assert themselves could be highly disruptive to a school board meeting.
- School directors and district administration do not have any additional privileges or designations — they are assigned as participants. This could make roll call and voting more difficult.
- During public comment, members of the public would need to use the Chat feature to indicate their desire to be recognized. The chat box is the only method to communicate without unmuting to speak.

**Zoom Webinar**

- Since a webinar has a smaller number of attendees (100), districts should be clear that if a member of the public wishes to issue public comment during the meeting, he/she should register early to secure a spot as a meeting participant. In the communication with the potentially larger public of observers, districts should communicate how members of the public can view the livestream and communicate to the board and district through alternative means (i.e., district email, public complaint process (policy 906), and district staff phone numbers).
- Panelists — school directors and district administration — may unmute themselves to speak or the host may unmute them. But other participants are unable to unmute to potentially disrupt or talk over a school director or district administration.
- The Raise Hand feature can be used by members of the public to indicate their desire to submit public comment. The Zoom host can acknowledge them and unmute for their public comment.

It should be noted that anyone joining Zoom meetings or webinars via their phone (using the dial-in number provided after registration) may not be able to use the Chat, Raise Hand, or Q&A features. This may not allow a member of the public joining only by phone to submit public comment. A school board is obligated to afford a reasonable opportunity for public comment but is not obligated to ensure that everyone in the community can do so at all times. PSBA recommends you consult with your school solicitor and information technology staff to determine whether additional options
should be made available for public comment. Members of the public always have other ways to communicate with the school entity and its board, via letters, email, etc.

**Schedule the Zoom Webinar or Meeting**

There are many settings to consider when setting up a digital board meeting on Zoom. PSBA recommends scheduling with the required registration that issues an automatic approval. In requiring registration, the district forces email authentication and reduces the potential for spammers disturbing the meeting. By choosing the automatic approval, the district avoids staff time dedicated to manual approval and avoids a potential public complaint for those who may register right before the meeting but were not manually approved.

Zoom does allow for registration while the meeting is in progress. The district’s Zoom host would want to be aware that members of the public may register late and join throughout the duration of the meeting — just like members of the public may come and go during a physical meeting of the board.

When scheduling the webinar or meeting, there are several settings to consider. First, Zoom accounts have over-arching settings for each account profile. These settings apply when the account is hosting a planned meeting or webinar. To access these settings, click on the left navigation menu (when logged in via a web browser, like Chrome).
Or, individuals can access these account settings via the desktop app by clicking on the profile picture in the top right corner.

The other settings will be specific to the scheduled webinar or meeting. These settings are chosen when scheduling the webinar or meeting. Webinars have fewer setting options than meetings, making their scheduling more streamlined.
Step 2: Plan

- Recurring webinar: Every month on the first Mon., until Oct 3, 2020, 6 occurrences
  - Recurrence: Monthly
  - Repeat every 1 month
  - Occur on: Day 3 of the month
    - First
    - Monday
  - End date: By 10/03/2020

Registration:
- Required
  - Attendees register once and can attend any of the occurrences
  - Attendees need to register for each occurrence to attend
  - Attendees register once and can choose one or more occurrences to attend

Webinar Password:
- Require webinar password

Video:
- Host: On
- Panelists: Off

Audio:
- Telephone
- Computer Audio: On
- Both
- Dial from United States of America

Webinar Options:
- Q&A
- Enable Practice Session
- Only authenticated users can join
- Record the webinar automatically: On the local computer
- In the cloud

Alternative Hosts:
- boardssecretary@psba.org
- superintendent@psba.org

Schedule: Schedule | Cancel
Recommended Zoom Settings for Digital School Board Meetings

The following are settings PSBA recommends for digital school board meetings conducted through Zoom Webinar:

- Require registration (if recurring, for each occurrence) for access to webinar via an emailed link. (Requiring password is a local decision.)
- Set registrations to auto-approve.
- Allow only the host and co-host to share screen, not panelists.
- Set Q&A to be viewable only by host/co-host.
- Set panelists’ microphones to be muted upon entry. (They may unmute after entry or wait for host to unmute.)
- Using panelists’ video for webinars is a local decision but districts should consider at minimum having videos turned on briefly during roll call to verify identity of school director.
- NOTE: All participants video and microphones are automatically muted in Zoom Webinar. (They are not able to unmute; only host may unmute.)
- Approve both telephone and computer audio for meetings and webinars.
- Enable practice session.
- Record the webinar automatically (stored on local computer or in the cloud).
- Assign alternative hosts to board secretary and superintendent email/accounts as backup for webinar hosting and screen sharing. (This is a setting that needs to be enabled or can be done at the beginning of the meeting. The host can elevate any panelist to co-host.)

Additional Zoom Tutorials for Webinar Settings
Scheduling a Zoom Webinar with Registration

To enable and use a webinar practice session: Webinar Practice Session

Appendix B of this document: Zoom’s step-by-step guide for webinar scheduling and customization.

Recommended Settings when using Zoom Meetings

The following are settings PSBA recommends for using Zoom Meetings. Districts may use different settings if using Zoom for a staff meeting or purposes other than a public meeting of the school board.

- Require registration (if recurring, for each occurrence) for access to meeting via an emailed link. (Requiring password is a local decision.)
- Set registrations to auto-approve.
- Disable “Join Before Host” and enable “Waiting Room.”
- Disable “File Transfer.”
- Disable “Allow Removed Participants to Rejoin.”
- Allow only the host and co-host to share screen.
✓ Set chat to be viewable only by host/co-host.
✓ Set participants’ microphones to be muted upon entry.
✓ Set video for participants to be off upon entry.
✓ Approve both telephone and computer audio for meetings and webinars.
✓ Schedule a practice meeting before public school board meeting.
✓ Record the meeting automatically (stored on local computer or in the cloud).
✓ Assign co-hosts to board secretary and/or superintendent as backup for meeting hosting and screen sharing.

Additional Zoom Tutorials for Meeting Settings

Scheduling a Zoom Meeting

To understand the Zoom host and co-host administrative controls during a meeting, refer to this Zoom tutorial: Host and Co-Host Controls in a Meeting

To understand how to share files during meetings using Zoom platform, refer to this Zoom tutorial: In-Meeting File Transfer

To create a waiting room for meeting session (not available for webinars), refer to this Zoom tutorial: Waiting Room

Distribute Devices, Train Team

If the district is providing devices, the IT team should have the Zoom app/shortcut and an email app/shortcut easily accessible. Ideally, support in setting up a Zoom account and profile should be provided for each school director and district administrator who will join the digital board meeting or other meetings the district may hold using the Zoom license.

Support for setting up Zoom desktop app, desktop client, web client or mobile app can be found on the following Zoom tutorial page: Getting Started.

The district team — board leadership, superintendent, IT staff—should determine what type of training will be possible with staff and school directors who may be using the Zoom platform and/or the district device for the first time. If the district can’t provide devices to school directors, training will need to be more individualized as school directors will be using personal devices to join a meeting and potentially create their own Zoom account. During training (which could simply be a conversation), ensure that each participant’s device has both a working speaker and microphone, at the very least, or determine if a headset or other hardware may be needed. If using a tablet, determine if use of a stylus will be needed to provide better accessibility.
Part of the training should be to ask each member of the team to join a meeting and webinar to use the features in each successfully. District leadership should be trained on how to access files and district materials necessary for the board deliberation and actions at the meeting. PSBA recommends using BoardDocs or district-provided email accounts to send PDF files, board meeting agenda, and other documents referenced during the district meeting. These trainings should be on the device and on the internet network that the administrator or school director would be using when accessing a digital board meeting so that potential issues are identified early and solved before the public meeting.

To determine if internet speed or connection may be challenging, the web tool speedtest.net can be used to communicate potential issues to district IT staff. If connection speeds are limited for any member of the board, consider using audio only for that member’s connection. Sunshine Act compliance does not require that every board member’s face be visible so long as what they say can be heard and they can hear everything said by others.

**Publish, Post, Notify**

PSBA recommends the following be added to the usual required meeting notice:

- The virtual connection (Zoom link) and/or livestreaming information — this should be placed where you would normally place the location of the meeting in the advertisement.
- Provide suggestions for accessing public internet (if available) in the community, such as library or district access in parking lots.
- Explanation of public comment process for your digital meeting.

The published newspaper notice could simply state that the meeting will be conducted in virtual mode via Zoom, include the link for the meeting as location and direct people to visit the district website for additional connection information and details.
**Step 3: Test**

In Zoom’s webinar settings, the administrator of the account can “Enable Practice Webinar” which allows the Zoom host and panelists to practice the logistics of the webinar before broadcasting to the public who have registered as participants. This test webinar should be used to ensure the following are functioning appropriately:

- Individual sound settings — all panelists/hosts can hear and be heard by all other panelists/hosts
- Video settings, if being used. Those with videos turned on need to recognize that facial expressions, gaze and background will be viewed by all who participate in the meeting.
  - Lighting should be in front of them not behind to see their face.
  - Background movement should be kept at a minimum to decrease distraction.
  - Camera should be aimed at their face, not ceiling or an inanimate object.
- Share Screen setting, if being used. All panelists can see the material being shared clearly.
- Technology troubleshooting — all panelists should test contact through the provided number of the Zoom host or IT staff by calling or texting.
- Zoom host should demonstrate how to mute/unmute and change the view from Speaker to Gallery.
- Zoom host can elevate any panelists to co-host or turn over host duties to another.
- Board secretary reviews roll call, voting procedures, and reminds directors to state full name when making or seconding a motion.

Participants should be instructed at the beginning that discussion must be limited to testing the platform and technology setup, and that no discussion of agency business is permitted. Every individual should join the meeting from his/her own device to be clearly heard and, if using video function, clearly seen. If multiple members of the district administration or staff are on-site for the meeting, they should join the webinar/meeting from separate rooms. Joining a Zoom meeting from two devices while located in proximity will cause audio feedback. If joining from the same room is necessary, one individual will always need to stay muted.

It may be wise to assign someone the Participant role in order to test the settings and functions of the webinar from the perspective of a registered attendee who may submit public comment using the Raise Hand or Q&A features of the webinar (or the chat box of the meeting).

To minimize disruption to the meeting due to a technology glitch, multiple individuals (usually alternative and co-hosts) should have digital copies of materials being shared in the meeting. If one person has trouble sharing materials during the meeting, others could share from their devices. Materials should also be saved locally rather than shared from a cloud drive if possible — this is especially true if the material is a video or large multimedia file like PowerPoint. During the test, the host and each alternative host should test their ability to screen share and access the documents for the meeting.
Step 4: Launch

Welcome & Expectations

If using Zoom Webinar, the host may start early, which allows participants and panelists to join but stay muted until the official start time. If using Zoom Meeting, a waiting room can be enabled to hold those who arrive early until the host officially starts the meeting. Whoever opens the meeting should set some expectations for all attendees by touching on the following:

- Identify the digital platform. “You are joining a Zoom webinar.”
- Reiterate the public comment policy; explain how the public identifies and provides public comment via the Zoom platform.
- Explain Chat Box, Raise Hand and Q & A features (if enabled). Explain that questions and chat comments are not visible to anyone other than the host.
- Explain the role of Zoom host to mute/unmute, identify and lower raised hands, and troubleshoot technical issues.
- Announce that a test was conducted for directors and district staff to test technology and that no discussion of agency business occurred. This is largely to demonstrate transparency and to actively work to build trust as the board transitions to a new platform.
- Announce that the meeting is being recorded (and, if applicable, livestreamed through another platform).
- Share where the public was provided access to the meeting agenda. The Zoom host can also share screen with the agenda.

Policy 006.1 Provisions

The PSBA policy guide for Board Policy 006.1 Attendance at Meetings Via Electronic Communications has been adopted by many school boards to allow for remote participation by school board members due to illness, travel, weather conditions or other situations that require a school board director to be physically absent from a board meeting. The policy of many school boards contains a provision limiting the number of members permitted to participate remotely so that at least a quorum would be physically present at all meetings.

The newest revisions to Policy 006.1 issued by PSBA include provisions for conducting digital school board meetings in emergency conditions to allow participation by all school directors and other necessary participants remotely through electronic means. School entities, in consultation with their school solicitor, should consider updating Policy 006.1 to include these provisions and may contact policyprograms@psba.org for assistance.

If a board has not yet adopted these additional provisions for Policy 006.1 on emergency conditions, the board may choose to suspend particular provisions of a board policy. Although we believe that a board always has the ability to temporarily suspend a policy, many boards have chosen to include language specifically providing for this in Policy 003 with a provision such as the following:
“The Board may, upon a majority vote, cause to suspend at any time the operation of a Board procedure or policy, provided the suspension does not conflict with legal requirements. Such suspension shall be effective until the next meeting of the Board, unless an earlier time is specified in the motion to suspend.”

School boards, in consultation with the school solicitor, thus may consider suspending the following provision included in the version of Policy 006.1 adopted by many boards in order to allow remote participation by additional school board directors, or to conduct a virtual board meeting: “A majority of Board members shall be physically present at a Board meeting when a Board member attends through electronic communications.”

If a school board does not have a policy on attendance at meetings via electronic communications, this does not prevent the board from conducting a virtual meeting. Having a policy is recommended, but not legally required in order to hold a digital meeting. School boards should work with their school solicitor to ensure that digital board meetings follow the requirements of law.

**Agenda**
When the board president has called the meeting to order, the board secretary should take roll call with each director stating verbally their attendance to comply with board policy and ensure accurate recording of minutes. Directors should repeat their full name throughout the meeting when making or seconding motions and voting for the same reasons.

Following the roll call and verification that a quorum is participating, PSBA recommends conducting the pledge of allegiance by posting a picture of a flag to either the digital agenda or by the Zoom host sharing screen of a flag image. By using such opportunities to replicate what happens at normal in-person board meetings, the board can lend a sense of decorum and normalcy to a new and potentially awkward situation.
Other options may exist to ensure accurate recording of votes. BoardDocs offers digital voting through its platform and Zoom offers polling options. PSBA does not recommend using polling during Zoom meetings of the board as polling cannot be limited among a subset of participants in the meeting, and therefore would not be a secure or potentially accurate process for submitting board votes.

To see more about adding polls, visit this Zoom tutorial: [Polling for Webinars](#).

The board president should announce the occurrence of any executive sessions that have happened since the previous public meeting that were not previously announced, at the place in the agenda where it is the board’s normal practice to do so.

**Public Comment**

Prior to receiving public comment, PSBA recommends that the board president verbally review the board’s rules regarding public comment during a digital meeting just as should happen in an in-person board meeting. Using the tools Zoom offers in both meeting and webinar formats, an individual should indicate a desire to submit for public comment. The Zoom host can acknowledge this individual, unmute him/her, and begin timing his/her public comment.

As always, the board can reserve the right to limit the public comment period to a certain overall time as well as limiting individual public comment time. Board Policy 903 should outline the limitations and requirements for each local board to enforce through digital meetings as well as physical ones.
Some additional considerations and recommendation for public comment:

✓ Public comment is not a question period directed to the board, but rather a time for the public to submit comments to the board. In the new digital environment, the Q&A feature may cause individuals to submit questions, expecting a response from the board during a board meeting, which is not the purpose of public comment. Therefore, the setting of expectations and reminder of the board policy on public comment are important.

✓ PSBA recommends using the Raise Hand feature as part of the Zoom Webinar features for the public to be acknowledged for comment.

✓ PSBA recommends boards to consult with their solicitor before admitting public comment via written statement (email, chat, etc.) to be read.

✓ Video functionality may or may not be available for public comment depending on whether the Zoom Meeting or Zoom Webinar option was chosen for the digital board meeting. The public should be made aware of this limitation prior to public comment.

### Additional Zoom Tutorials for Launching Digital School Board Meetings

**Webinar:** To see how an attendee joins a webinar, visit the following Zoom tutorial: [Joining and Participating in a Webinar as an Attendee](#)

**Webinar:** For the Zoom host to understand how to manage participants in a webinar, visit the following Zoom tutorial: [Managing Participants in a Webinar](#)

**Meeting:** To start the meeting as the host, visit the following Zoom tutorial: [How do I Start or Join...?](#)

**Meeting:** To support training of participants joining a meeting, visit the following Zoom tutorial: [Joining a Meeting](#)
Accessibility Considerations & Options

Visual Impairment
Zoom is supported by screen reader technology; however, some screen readers may have difficulty recognizing the prompts on the participant interface and users may need some assistance in navigating. It is important that your meeting/webinar materials are also optimized for this technology.

Share any documents and/or presentations that you will be referencing in the meeting/webinar in a screen-readable/modifiable format. PDF files should be created in an accessible format (see Adobe PDF Accessibility).

Be sure that all images used have alt text (alternative text), which is simply a description of the image that is read aloud by a screen reader. It’s best to think of this description as the way you would describe the image if you are telling someone about it over the phone.

Regardless of the materials you are sharing, proper formatting is crucial to ensure that the end user can adapt them as needed. For more information on making your materials accessible, you can check out Penn State’s Accessibility page or the World Wide Web Consortium (W3C) Web Accessibility Initiative (WAI).

Audio Impairment
Zoom has several features to help ensure hearing-impaired audience members can participate in the meeting/webinar.

If there is a need to accommodate for live closed captioning, Zoom has the capability to have an assigned host/co-host/panelist (or an attendee in a meeting) to type those captions. For more information, check out Getting Started with Closed Captioning. You will need to ensure the individual assigned to perform this task has adequate skills.

Even if there is no immediate request, you should still have a transcription of the meeting/webinar for those who may watch it at a later time. Zoom automatically transcribes your meetings/webinars (recorded to your Zoom cloud). These are then synchronized to the video recording, allowing the text to be searchable for specific topics in the recording. It would be advisable to review these auto-transcriptions for mistakes. For more information on how to activate this function, please visit, Automatically Transcribe Cloud Recordings.

If you are livestreaming your meeting/webinar on another platform, you can find out more information on YouTube’s closed captioning here, or Facebook’s closed captioning here. If you typically provide sign language interpretation at your physical school board meeting as an accommodation for individuals who have made that request, you need to provide that
accommodation in the virtual meeting as well and ensure you have video capability to display the individual performing the sign interpretation.

**Physical/Mobility Impairment**
Zoom has shortcuts and hot keys for those who may have limited mobility. For more information, visit [Hot keys and Keyboard Shortcuts for Zoom](#). Standard tab and arrow keys work well to navigate the Zoom participant interface.
Appendix A: Personal Checklist for Webinar/Meeting Test

- **CONNECT YOUR EQUIPMENT**
  - Headset with microphone
  - Webcam/phone camera

  We recommend using a headset microphone (included with many phones). This will eliminate feedback issues and minimize background noise.

- **TEST YOUR COMPUTER/TABLET/PHONE**
  Test your device to ensure that Zoom will run properly. Click [here](#) to join a test meeting. After clicking the join meeting link, a prompt to download and run Zoom will appear. Open the downloaded zip file and follow the prompts. Alternatively, download the Zoom app for mobile, desktop, or browser prior to joining the test meeting.

- **TEST YOUR EQUIPMENT**
  - Turn your webcam on and off
  - Check your microphone
  - Mute and unmute your microphone

  For any audio or video issues, follow the instructions in this [Zoom Audio/Video Tutorial](#).

- **TEST ZOOM’S HOSTING FUNCTIONS** (For host/co-hosts ONLY)
  - Test sharing your screen. For more information: [Zoom’s tutorial on screensharing here](#).
  - Familiarize yourself with muting and unmuting microphones.

  Visit Zoom’s comprehensive overview of [hosting and co-hosting controls page](#). For a complete list of Zoom tutorials, please visit the [Zoom Help Center](#).

- **SHARE CONTACT INFORMATION**
  - Text or call the number provided from your district as the technology support (may be Zoom host)
  - Share your number with technology support person for Zoom (may be Zoom host)

  Having an alternative communication channel to access during the live meeting is important if technology glitches or challenges arise.

- **CHOOSE LOCATION**
  - Choose a location where you can control sound and movement (as much as possible)
  - Choose a location that offers adequate lighting if enabling the video function

  Sounds that can register as background noise (heating, AC, foot-traffic, etc.) in the physical environment can become very noticeable and distracting in an online setting. Movement in the background of a video can also become distracting. This can be mitigated by [enabling virtual backgrounds](#). Check with your Zoom host and district staff about this option.
Appendix B: Frequently Asked Questions

**PSBA License**
How do school boards obtain a free, one-year Zoom license?
PSBA is currently offering full-year Zoom licenses for every member school district and Career and Technology Center. If a district is interested, indicate by filling out the survey at paschoolsready.org. In partnership with CM Regent Insurance, PSBA is providing an Enterprise Licensed Educator Account with access to Zoom Webinars and Zoom Meetings. Further training on the Zoom platform is offered through PSBA.

What does the PSBA license include?
Your Zoom license through PSBA in partnership with CM Regent Insurance offers the option to schedule a Zoom Webinar or a Zoom Meeting. The PSBA-provided Zoom licensing limits active participants in a webinar to 100 and active participants in a meeting to 300.

Do school boards need a separate license for every school board director? What about anyone that is invited to a digital meeting via Zoom that is not on the school board?
No, only one license is needed per district in order to host a digital meeting. Other participants can be added to a digital meeting if there is a licensed host.

**Webinar vs. Meeting**
What is the difference between a Zoom Webinar and a Zoom Meeting?
The PSBA-provided Zoom licensing limits active participants in a webinar to 100 and active participants in a meeting to 300. To see a full comparison of features, visit the following Zoom resource: [Meetings vs. Webinars](#).

Does PSBA recommend the use of a Zoom Webinar vs. Meeting?
For digital school board meetings, PSBA recommends using the Zoom Webinar format to allow for school directors and district administration to be designated as “panelists” which offers more control in participating in the meeting than those in the public audience who are designated as “participants.” Participants can only participate in the webinar meeting when granted access by the Zoom host.

Can Zoom Webinars and Meetings both be recorded?
Yes, both webinars and meetings can be recorded in Zoom.

What is the purpose of recording a digital school board meeting?
Recording digital school board meetings is not required by law, but doing so can have some advantages. First, it can help the board secretary in preparing minutes. It also can provide a way to further ensure meetings are more accessible for persons with disabilities, such as by allowing
for more accurate closed captioning. Since members of the public also can record meetings and post those recordings online, it can also provide an “official” version that can be referenced against edited or manipulated versions.

**Zoom Webinar and Meeting Roles (Host, Co-host, Panelist, Attendee)**

What is the difference between the role designations within a webinar or meeting?

- The host of the webinar is the user who the webinar is scheduled under. He/She have full permissions to manage the webinar, panelists, and attendees. There can only be one host of a webinar. The host can do things like stop and start the webinar, mute panelists, stop panelists’ video, remove attendees from the webinar, and more.

- Co-hosts share many of the controls that hosts have, allowing the co-host to manage the administrative side of the webinar, such as managing attendees or starting/stopping the recording. The host must assign a co-host. Co-hosts cannot start a webinar. If a host needs someone else to be able to start the webinar, he/she can assign an alternative host.

- Panelists are full participants in a webinar. They can view and send video, screen share, annotate, etc. You must be assigned panelist permissions by the webinar host. The host can also disable some features for panelists, including starting video, sharing your screen, and recording.

- Attendees are view-only participants who can be unmuted if the host chooses. Their view of the webinar is controlled by the host. They can interact with the host and the panelists through the Q&A and the chat.

**Public Comments**

How should public comment be handled during digital school board meetings?

Prior to receiving public comment, PSBA recommends that the board president verbally review the board’s rules regarding public comment during a digital meeting just as should happen in a normal, in-person board meeting.

Can an individual indicate that he/she would like to submit for a public comment?

Yes. Using the tools Zoom offers in both meeting and webinar formats, an individual should indicate a desire to submit for public comment. The Zoom host can acknowledge this individual, unmute him/her, and begin timing the public comment. PSBA recommends using the “Raise Hand” feature as part of the Zoom Webinar features for the public to be acknowledged for comment.

Can the board reserve the right to limit public comment in a digital school board meeting?

Yes, the board can reserve the right to limit the public comment period to a certain overall time as well as limiting individual public comment time. Board Policy 903 should outline the limitations and requirements each local board has established that would apply to digital meetings as well as physical ones.

Can public comment be submitted via a written statement (email, chat, etc.)?
PSBA recommends boards to consult with their solicitor before admitting public comment via written statement (email, chat, etc.) to be read. Boards are unlikely to permit written public comment when meetings are not held virtually, except perhaps as a disability accommodation, and should consider how otherwise allowing this in a normal setting could have undesirable manifestations.

Does video functionality have to be used for public comment in digital school board meetings? Video functionality may or may not be available for public comment depending on whether the Zoom Meeting or Zoom Webinar option was chosen for the digital board meeting. The public should be made aware of this limitation prior to public comment. It is not believed to be a requirement of the Sunshine Act.

How does someone who calls in to a digital board meeting indicate he/she would like to submit a public comment? If the individual is not using the Zoom app and is only using phone audio, he/she may not have a way to indicate. This will have to be a local decision regarding whether the board wants to facilitate a different route in this situation. However, PSBA believes this is not required by law.

If questions are submitted to the host of a meeting, do ALL the questions that were submitted have to be addressed during the meeting to follow the Sunshine Laws? Agencies are not legally obligated to respond to questions asked in the course of public comment. A statement from the chairperson that an appropriate staff person will respond to the question is sufficient.

**Executive Session**

Can school boards enter an executive session during a digital school board meeting? If so, how? Boards legally may pause a public meeting to commence an executive session at any time, so long as the reason is properly announced, just as with an in-person meeting. How the executive session is conducted will depend on the electronic meeting platform being used.

Can school boards use breakout rooms for executive session? It is not yet clear whether the use of the “Breakout Room” function of Zoom or similar features of other platforms is sufficiently secure to ensure the confidentiality of executive discussions. It is recommended that a separate Zoom Meeting, which only board members and other needed participants can access be used for this purpose.

How should school boards address the confidentiality of executive session in a digital environment? For example, how do we know that a board member doesn’t have someone listening in at their remote location? This concern should not stop a board from holding a virtual executive session when necessary,
absent particular security concerns. There is no effective way to ensure that when someone is participating electronically in a meeting there is not someone at the remote location also listening in, just as there is no way to ensure that a board member attending a normal executive session in person does not divulge what was discussed to others. It is recommended that each participant be asked whether anyone else is able to hear the discussion, but beyond that there is little else that can be done. Also, it should be taken into account that virtual meetings are subject to the same internet security vulnerabilities as any other online activity.

For more information on transitioning to digital board meetings and for a more comprehensive guide for using Zoom for school board meetings, visit myPSBA.org to view recorded training in the store, share best practices in the discussions, and download additional guidance from resources. Email edandtraining@psba.org for direct inquiries about using Zoom.
Appendix C:
One-Page Guide for Secure and Effective Zoom Settings for School Board Meetings
Tips for **SECURE** and Effective Digital School Board Meetings on

- Require registration to Zoom Webinar and enable auto-approve for registrants.
- Designate district administration and school directors as panelists in Zoom Webinar.
- Encourage all panelists to create a personal Zoom account for easier authentication.
- If using video and if devices permit, select a virtual background for panelists.
- Assign alternate hosts in case of technical difficulties.
- Turn screen-sharing options to “host only.”
- Set Q&A to be viewed only by the host/co-host.
- Use Raise Hand feature to facilitate public comment.
- Approve both telephone and computer audio.
- Set all microphones to be muted upon entry.
- Enable livestream to allow for more participants than limitation of license.
- Disable comments on livestream platform.

If using Zoom Meetings, the following additional settings will enhance security and promote effective meetings:

- Set all microphones to mute and all video off upon entry.
- Disable “Join Before Host” and enable “Waiting Room.”
- Disable “File Transfer.”
- Disable “Allow Removed Participants to Rejoin.”
- Set chat to be viewable only by host.
- Do not share any meeting links publicly; require password and/or registration to join. (Registration link should be shared publicly for school board meeting)

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Appendix D:
One-Page Overview of Transitioning to Zoom for School Board Meetings
Step 1: Assess
- Assess your team and designate someone beyond the superintendent, board chair, and board secretary to be the Zoom host.
- Assess your technology for microphone, video, and Internet speed capabilities.
- Assess your timeline for public notice, device distribution and/or training, and accessibility accommodations.

Step 2: Plan
- Understand the difference between Zoom Webinar and Zoom Meeting. PSBA recommends using Zoom Webinar for digital school board meetings.
- Schedule Zoom Webinar and advertise registration link along with livestream information.
- Adjust settings to ensure secure and effective meetings.
- Educate public and board on how public comment will be facilitated in the digital meeting.

Step 3: Test
- Hold one-on-one tests for each member of the board and district administration team.
- Hold a practice webinar for board to join prior to public meeting, emphasize to all participants that discussion will be limited to testing platform and technology.
- Ensure digital materials are saved locally to Zoom host device and one alternative host device.

Step 4: Launch
- Set expectations and review public comment policy during welcome remarks.
- Announce that test was conducted, and school board meeting will be recorded (if applicable, and livestreamed).
- Share agenda with image of a flag to conduct pledge.
- Roll call, voting, and motions should all proceed with school director identifying him/herself by stating full name.
- Hold public comment by using Raise Hands feature in Zoom Webinar to be acknowledged by Zoom host and have microphone unmuted to submit comment to the board.

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