Virtual Event Planning Checklist

Event Design

Event Date & Time		
Audience		Invited guests, Brown Community, public
Estimated # of Attendees		
Registration		N/A, Eventbrite, Google Form, Zoom, other.
Event Platform		Meeting, Webinar, or Livestream
Media Services		Place your order with Media Services if support is requested
Marketing Plan		
Event Outline		

Facilitation Team

Technical Manager		Starts meeting, troubleshoots technical issues, removes/admits participants
Event Moderator		May offer an introduction, moderate Q&A, chat, slide sharing, etc
Speakers/Panelists		
Practice Session(s)		

Zoom Setting Decisions for Events

Host Name		This person will control all settings and start/end the meeting. For events, it is recommended that this be someone other than the speaker/panelist.
Co-Host Names		
Panelist/Speaker Names		

	ON/YES	OFF/NO	*Red indicates recommended settings to enhance event security.
			Reference CIS's Zoom Security Settings article for more information.
Start with Host Video/Sound On	☐	☐	
Start with Participant Video On	☐	☐	For meetings, participants will be able to change this. For webinars, video is fully disabled.
Mute Participants Upon Entry	☐	☐	Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. This is a default setting for webinars.
Join Before the Host	☐	☐	If allowed to do so, the meeting will go live when the first participant signs in, even if the host has not. This is not recommended. Webinars will not be accessible to attendees until broadcasted.
Only authenticated users can join meetings	☐	☐	If enabled, only participants who are logged into their Brown Zoom accounts using SSO will be able to join. Note: this means that guests cannot call in by phone. They must go through the Zoom app.
Require a password	☐	☐	
Participant chat	☐	☐	Allows meeting participants to send a message visible to all participants
Play sound when participants join or leave	☐	☐	This is not recommended for events. While a helpful alert if security is a concern, it can be distracting.
Record	☐	☐	Be sure to collect image release forms
Polls	☐	☐	This allows the host to survey the attendees live, during the event.
Allow participants to share screen	☐	☐	This allows participants to share their screen or content during meetings without requesting permission.
Annotation	☐	☐	Allows participants to use annotation tools to add information to shared screens
Whiteboard	☐	☐	Allows participants to share whiteboard during a meeting

Nonverbal Feedback	☐	☐	Participants can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel. Available in meetings only.
Allow Removed Participants to Rejoin	☐	☐	
All Participants to Rename Themselves	☐	☐	Attendees joining with a Brown University account will join with their full name automatically associated with their image/phone numbers.
Breakout Rooms	☐	☐	Participants can be pre-assigned to breakout rooms if Zoom registration is required. Otherwise, they can be assigned during the meeting or self select. Moderators should be present in each room. Available in meetings only.
Closed Captioning	☐	☐	Can be typed by co-host in meetings. Available for webinars only if supported by Media Services. Fee will apply.
Far End Camera Control	☐	☐	Allows another user to take control of your camera during a meeting.
Enable Waiting Room	☐	☐	If enabled for meetings, attendees will be held in a waiting room until allowed access by the host one at a time. Helpful for controlling access, but can be time consuming for large meetings. In webinars, attendees will not be admitted until webinar is broadcasted.
Live Streaming	☐	☐	Only if supported by Media Services. $85 set-up fee will apply.

Enhanced Zoom Settings for Events, Webinar Only

Q&A	☐	☐	If yes, choices are to make Q&A visible to all (allowing them to vote & move questions to the top of the que) or make only questions that have been answered publicly visible to attendees. Q&A cannot be entirely hidden.
Practice Session	☐	☐	Hosts can log-in at any time before the meeting to practice/check settings (even days before). Host can allow panelist access during these practice sessions, but panelists cannot access without a host.
Set Default View for Attendees	☐	☐	This can be controlled by the host in webinars only. Gallery will keep all speakers on the screen at all time. Active Speaker View will switch between speakers.
Option for Attendees to "Raise Hand"	☐	☐	This can be used silently to solicit attendee yes/no participation. To ask audibly, attendees can be unmuted by webinar hosts.

Settings Available at Start of Meeting			
Lock Meeting	☐	☐	