STATE OF RHODE ISLAND
IMPLEMENTATION PLAN
ZOOM FOR PUBLIC MEETINGS
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Statewide Implementation Plan: Public Meetings Using Zoom
On March 16, 2020, Rhode Island Governor Gina Raimondo issued Executive Order 20-05 and on April 15, 2020, Executive Order 20-25, related to Public Meetings and Public Records Requests. These orders “relieved” public bodies “from the prohibitions regarding use of telephonic or electronic communication to conduct meetings,” contained in Rhode Island General Laws 42-46-5(b), and makes provisions to ensure public access to the meeting of the public body for members of the public through adequate, alternative means. The first order only allowed for this relief providing the public body is meeting for an essential purpose, but the second eliminated the “essential” requirement.

To support municipalities conducting remote meetings under these Executive Orders, the Department of Business Regulation, with the support of the Division of Information Technology (DoIT) within the Department of Administration (DOA) will be procuring Zoom accounts for the municipalities to use during this time.

This document includes the Zoom Implementation Plan for Municipalities, as well as best practices for conducting public meetings using Zoom.

Zoom Implementation Plan for Municipalities
The Department of Business Regulation, in collaboration with the Division of Information Technology, is procuring accounts for municipalities to use Zoom for remote public meetings. The rollout of Zoom will include the following steps:

1) Contacts and requirements gathered from municipalities
2) Zoom procured by DoIT and DBR
3) Municipal users provisioned with Zoom host accounts
4) Support plan for installation and use implemented between DoIT and municipal IT staff

Information Gathering from Municipalities
As the State works to define the requirements for purchasing Zoom licenses for municipal use, we have been consulting with representatives from the Rhode Island League of Cities and Towns and various city and town clerks. In addition, a survey was sent to each municipality requesting information about the municipality’s remote meeting needs, as well as the IT staff contact responsible for supporting such software.

Procuring Zoom
The Division of Information Technology procured Enterprise Zoom accounts for use by municipalities for the purpose of conducting public meetings. The final procurement decisions are determined based on the results of municipal surveys with regards to the number of accounts and users per municipality. Depending on the number of additional licenses a municipality may want and the detail of the final contract, we expect that municipalities can procure them through Zoom or SHI, the reseller that works with the State.

Collaboration Finalization
The State and municipalities will work together to define roles and responsibilities for engaging with the Zoom contract and using any support resources.

Provisioning Municipal Users
To implement Zoom quickly with all municipalities, DoIT will be working with the IT staff member contact identified via the survey to permission users and set up accounts. DoIT will be sharing best practices for permissioning users, as well as for the process that those users will utilize to
conduct public meetings using Zoom. Once accounts are set-up, users can take advantage of online training options from Zoom to learn about key functionality. Practice meetings (duly noticed under OMA) are highly recommended for each public body before it conducts its first real virtual meeting. For more on the online training options, please see Helpful Training and Materials.

Support Plan for Using Zoom for Public Meetings
The State will work with municipalities to clearly define the responsibilities for supporting public meetings using Zoom, identifying who from the municipality, DoIT, or Zoom corporate, will provide support for public meetings when they are live.

At minimum, each meeting should have a host who is responsible for managing the platform, as well as the Chair or lead presenter, who will run the meeting from an administrative standpoint. The host may be administrative staff who are comfortable with using the technology or a member of the IT staff. If the host is not a member of the IT staff, IT support should be available to provide coverage for the meeting in anticipation of any issues that may occur for the presenter(s) or the public.

Consider the following options of IT support:

*Municipal IT Lead:* For issues related to installing Zoom on your computer, setting up speakers and/or video, and any other issues related to your personal or municipality-provided computer, please engage with your municipal IT lead.

*Zoom Corporate:* The State's Enterprise Zoom account comes with multiple options to connect to Zoom support. If you have an issue with setting up a meeting or webinar, or you have any questions about the settings in your Zoom account, this should be your first resource. You have three options for reaching out to Zoom.

- **Phone Call** - You and your users should see a phone number in the upper right-hand corner of your Zoom account when you log in (1.888.799.0125). This is your account's dedicated number to reach Zoom technical support and is the best avenue for questions that need to be answered urgently. Have your personal meeting ID and host key ready; you can only use phone support if you enter these identifying numbers.

- **Chat** - There is a little blue "Help" button on the lower right-hand side of your Zoom web portal. This is the same team that handles the phone support line and is best reserved for less urgent requests (clarification on a specific feature or process).

- **Ticket** - The "Submit a Request" button found on our help center ([support.zoom.us](https://support.zoom.us)) is the best way to submit a technical support ticket. You can also Cc the email alias - support@zoom.us and a ticket will automatically be created. Tickets are best used for a deeper analysis of an issue (say an audio discrepancy during a call). If at all possible, including the Meeting ID, Date, and Time in the ticket is advised.

*State of Rhode Island Division of Information Technology (DoIT):* If you have an emerging issue and are unable to reach Zoom, or you have a question about your access or license, please reach the State Enterprise Service Desk at Ent.servicedesk@ri.gov.

Please set the Subject line as the name of your municipality, and in the body of the email, include the name of the individual needing support, their contact number(s), the best time to call them within the hours of support, and a summary of the issue.
The State Enterprise Service Desk hours of operation are 7:30AM to 4:30PM. Please note that they will not be able to access your municipal or personal computer to provide guidance; if you have an issue related to your devices, please work with your municipal IT staff.

Running Public Meetings with Zoom
Preparing to run public meetings with Zoom poses three common questions:
1) Who will be engaged in the meeting and what are their roles?
2) What are the best practices for engaging individuals in each role, and
3) How do we share information about this meeting with the public?
This section will walk through each of these questions with best practice recommendations.

Who will be Engaged in the Meeting?
While an in-person meeting can often be easily managed by the Chair of the organization working from an agenda, organizing and facilitating a remote meeting adds additional complexity. For this reason, we strongly urge that municipalities engage staff who can manage the remote meeting and provide a basic technical support if needed.

For consistency, we will define terminology and roles as follows:

Platform: Any technology being utilized to allow convening remotely, which may include audio only via conference call, but is recommended to include both video and audio (Zoom).

Host(s): Individual(s) responsible for operating a digital platform to successfully facilitate a remote/virtual meeting under the guidelines set forth by Governor Raimondo’s Executive Order (EO 20-05) temporarily suspending certain provisions of the state’s Open Meetings Act.

IT Support: Individual(s) responsible for troubleshooting issues with the platform for both the municipal staff and entity members, as well as the participants. IT Support will be defined in collaboration with DoIT.

Entity Participants: Individuals who are part of (or officially advising) an elected or appointed body convening for a public meeting that has been publicly noticed as required by the Secretary of State of Rhode Island.

Participating Public: Individuals who may be (and/or have a reasonable expectation of) participating in the proceedings or interacting with the Entity during the public meeting.

Non-participating Public: Individuals who wish to observe the proceedings of the public meeting but will not be participating or interacting with the Entity during the public meeting.

What are the Best Practices for Engaging Individuals in Each Role?
Each person participating in the meeting should engage with the platform in a manner that best supports clear communication and reduces the risk of displaying inappropriate content.

Hosts The goal of the host should be to use the platform to support the successful facilitation of the meeting, engaging the appropriate stakeholders, sharing materials, and controlling all settings. Practice meetings are essential for the success of public meetings, and the host should conduct these with entity participants in advance.

a) Maintain the List of Participants: The host will have a list of participants (entity members and members of the participating public, if they sign up in advance) that will guide them in identifying whose line to open up and when.
b) **Admit Participants to the Meeting:** If a Waiting Room is used for the meeting, the host will admit participants into the meeting from the Waiting Room.

c) **Unmute Participants to Allow Participation:** Control whose line is open so that they can speak. Mute lines of everyone who is not speaking at the moment from the public; mute the lines of entity members who are not currently speaking if they are creating background noise or other distractions.

d) **Receive Electronic Exhibits:** When Participating Public individuals, such as neighboring objectors to an application, want to introduce an exhibit into evidence (that perhaps they could not have done so in advance because they didn’t know what the applicant was going to say until they heard it), they should be able to email it to the host so that it can be captured in the official Record, labeled, etc., and then either the Host or the Objector can share it on the screen with everyone. If participants need to share a file during a meeting, they can do a file transfer to the host if enabled.

e) **Record Meeting:** Ensure the meeting is being recorded. If functionality is available and enabled for saving the meeting to the cloud and generating and sharing meeting transcripts, the host will be responsible for using that functionality as well.

**Entity Participants** The goal of entity participants should be to be present on the platform, clearly visible with appropriate audio. Entity participants who will be presenting should submit their materials in advance; the host will display the materials and support the entity participants in walking through them. Practice meetings are essential.

a) **On Platform:** Members should be logged in to the platform with their identity clear and visible to the host and guests. Consider using a common virtual background, such as the Town Seal or a photograph of Town Hall, helps the public to easily determine who is an Entity Participant.

b) **Visible:** When possible, a video camera should be utilized, either on a desktop, laptop, tablet, phone or other web-enabled device so members are visible. If members need to walk away from a video camera in use, a recess should be called as it would be during an in-person meeting.

c) **Audible:** We recommend that all speaking participants dial in via phone audio (using a connection separate from that used by the camera). Benefits include:

   All speaking participants dial in via phone audio (using a connection separate from that used by the camera). Benefits include:
   i) Clear audio: voice is right next to the microphone
   ii) Reduced delay, allowing easier dialog between members
   iii) Ability to use the phone mute button (as opposed to Zoom platform mute)
   iv) Eliminate competition for the wi-fi signal between your video and voice
   v) If your wi-fi drops its connection, your ability to hear and speak is not lost

Please Note: **Muting is extremely important when not speaking.** This is a skill we must repeatedly teach participants. Even with no background noise in a participant’s location, if their speakerphone is on, it will echo in the room and cause unwanted feedback. Meeting hosts can mute participants at any time.
Please Note: Dialing in from a single speakerphone for multiple entity members in the same location is not recommended. A speaker who is physically distant from the microphone will always be more difficult to hear. If multiple entity members happen to meet in the same physical location, it is advised that they each be dialed in on separate telephones (with headsets or Bluetooth earpieces, etc. to avoid background noise) so their voices are both clear and distinguishable while upholding social distancing practices.

d) Credentials for joining the platform via webcam should be provided privately to entity members only so that there are no visible interruptions from individuals who are not meant to be presenting.

e) Important: To preserve the privacy of any participants joining via phone only, it is recommended to turn on the Mask Phone Number option (under Settings→ Telephone when setting up a meeting) so that their full phone number is not displayed. Please test to ensure if a Webinar is used, you can mask the phone numbers of participants while still seeing the phone numbers of the viewers (non-participating public).

f) Important: Care should be taken to make sure each vote or non-vote is recorded accurately and clearly, including Ayes, Nays and Abstentions (with Recusals). Recusals are often a signed paper documenting such, which may require an off-line process, including postal mail or printing/signing/scanning/e-mailing. Members will need to be educated about this ahead of or after meetings.

g) Process of Presenting: At the time that the chair of the entity determines that a presenter will speak, the chair will request that the host:
   i) Unmute the presenter
   ii) Share the first application/document that the presenter wishes to display
   iii) Offer Remote Control privileges to the presenter, so that they may page through or otherwise navigate the application/document they wish to display, or ask the presenter to narrate as the host navigates
   iv) Please Note: Allowing the display of documents from a remote computer adds additional risk that is not recommended. This is why documents are requested in advance and presented by the host, who may allow the presenter Remote Control privileges (to navigate the documents while narrating) if they are using the Zoom Application on their own computer. Guest presenters can be given mouse and keyboard controls, but they cannot pull up any alternative documents either by accident or on purpose, because they are not sharing their own screen.

Participating Public: Often the public participates directly in meetings, to speak or present information. When possible, the participating public should sign-up for testimony in advance, so that the host can approve them to join the meeting and unmute their line to present their testimony.

   a) Method(s) of “Signing Up” for Testimony and instructions for doing so: The entity must determine what methods will be provided to the public to sign up to give testimony, including any deadlines or timeframe restrictions, and this information should be provided at the top of the publicly posted agenda. Some methods to consider include, but are not limited to:
      i) Postal mail
      ii) E-mail
      iii) Phone call
iv) Text message

b) **Advance Notice:** It is recommended that guest participants contact the host in advance of any public meeting to:
   i) Confirm with the host that they do intend to speak at the meeting
   ii) Share what method they will be using to join the meeting (platform or phone only)
   iii) Share the number from which they will be calling (if phone only)
   iv) Email the host any material the presenter wishes to display

c) **Just-In-Time Notice:** If desired (or required), the host and chair of an entity may allow notice to be provided during the meeting. In such a case, someone must be regularly monitoring the “methods” offered to the public to communicate their interest in participating.

If you choose to use it, Zoom has a Raise Hand function. Users online can click a button to “raise their hand” to request to participate. You could choose to recognize and unmute them. For users who are on the phone only, they can enter *9 to “raise their hand.” For more information, see instructions [here](#).

d) **Process of Presenting:** At the time that the chair of the entity determines that a presenter will speak, the chair will request that the host:
   i) Unmute the presenter
   ii) Share the first application/document that the presenter wishes to display
   iii) Offer Remote Control privileges to the presenter, so that they may page through or otherwise navigate the application/document they wish to display, or ask the presenter to narrate as the host navigates
   iv) Please Note: Allowing the display of documents from a remote computer adds additional risk that is not recommended. This is why documents are requested in advance and presented by the host, who may allow the presenter Remote Control privileges (to navigate the documents while narrating) if they are using the Zoom Application on their own computer. Guest presenters can be given mouse and keyboard controls, but they cannot pull up any alternative documents either by accident or on purpose, because they are not sharing their own screen.

**Non-participating Public** Should be able to observe and hear the proceedings clearly, and measures should be taken to reduce or eliminate the possibility of interruptions (either audible or visible).

a) **Observe Only Option:** A meeting host has a limited capacity to actively manage non-participating meeting attendees within the platform, so ideally non-participating attendees are provided a view-only option that requires little to no management. There are two ways to accomplish this:
   i) **Using Zoom Webinar:** Hosts using Zoom Webinar have access to additional functionality that allows non-participating public to join the platform directly and be easily managed. The host(s) will see two different lists in the Participant Panel (Panelists and Attendees). If the host distributes invitations for the Zoom Webinar (by entering their e-mail addresses into the meeting invitation tool) to those expected to participate, those “Panelists” will be automatically put into the Panelist list.
when they join the Webinar. All others will be automatically placed in the “Attendees” list. Attendees cannot be seen or heard by anyone else attending the Webinar. However, they can type/chat with the host and be “promoted” to a Panelist if it is determined they should participate.

ii) Stream to Other Location: If you anticipate having more than 500 participants (including non-participating public), you may choose to stream to a second location so that more participants can view the webinar. For more information, click here.

b) Phone/Listen Only Option: The Non-Participating Public must have a “low-tech” option to hear the proceedings of a public meeting. The State is in the process of procuring a toll-free or local phone number. The host would be able to mute all lines to maintain control over who is speaking.

c) Recordings: Whether a) or b) or both options are provided, meetings should be recorded, and those recordings should be made publicly available.

d) Public Recordings: The public is allowed to record public meetings. For participants joining via Zoom, the host has the ability to enable guest/local recording by right-clicking on one’s name in the participant panel. We expect that any entity using Zoom for remote meetings is already recording and posting these recordings publicly, if not live streaming to a platform that accomplishes this simultaneously.

Executive Sessions

Experts recommend two different meetings (potentially on different platforms), one public and one private, to avoid accidentally permitting the public to hear an executive session (either live or via accidental publishing of the recording).

The members of the body would have to leave the first (Regular Session) meeting and join the second (private Executive Session) meeting, and then return to the Regular Session meeting when the Executive Session is complete.

It is recommended that both sessions be recorded.

Municipalities can make their own decisions regarding using remote meeting tools for Executive Sessions. The cleanest approach would be to use two different Zoom accounts, if you have access to them. Another approach to consider is using Breakout Rooms in Zoom; however, these are only available for Zoom Meetings and not Zoom Webinars. Note that if you want to record multiple rooms in a breakout session, each room needs a co-host and that co-host will have to save the recording locally (not to the Cloud).

How Do We Share Information about This Meeting with the Public?

Sharing information about the meeting with the public is an essential step in compliance with the public meetings rules. The following best practices from the City of Providence can help provide you with a model to share your meeting details.

1) Schedule the meeting on Zoom, and publish and distribute the joining details on the meeting agenda that is posted with the Secretary of State and on the Open Meetings Portal (if applicable). For the agenda, include the dial-in information and the Zoom link (if you plan to share the webinar link). For invited participants, including entity members, share the Zoom link. Here is an example of a public meeting agenda header when we were using Zoom Meetings (we did not share the Zoom web address):
And here is the corresponding information that was sent to entity members and invited guests, either via calendar invite or letter.

To view the meeting with a web-enabled device, please visit our YouTube Channel: https://bit.ly/pvdmeetings and refresh your browser every minute or two until the meeting starts.

To listen to the meeting only using a telephone, please dial: 1-646-876-9923, enter pin: 640475783# and press # to join.

Here is an example of a more recent public meeting agenda header after the City of Providence started using Zoom Webinar. Now they include the Zoom Webinar address, since “Panelists” will be in a separate list from “Attendees” and even though they don’t require it for the same reasons as before, the City of Providence still live streams to YouTube.
2) In Advance of Meeting, identify and make a list of all participants that are expected to join, either by name (Zoom ID) or phone number. In some cases, the default Zoom ID of a participant may be generic (e.g. iPhone8), so it is helpful to ask participants to change their Zoom Name to something more easily identifiable. Print out this list and have it ready to check off people as they are admitted when the meeting starts.

3) Set up your Zoom Waiting Room message (this only needs to be done once per account, unless you need to change your message). This message will be visible to anyone joining your meetings via Zoom and can be done in the settings under Waiting Room. This is what Providence’s Waiting Room message looks like right now on a smartphone:

4) Physically set up in a location where you have room for any materials you may need, and ideally with your computer connected to a large monitor, to be able to see as many participants as possible on your screen

5) Launch Zoom application and “Start Meeting” at least 15 minutes early

These best practices help communicate with the public in advance of the meeting and prepare you for success.

**Frequently Asked Questions**

**How can I ensure my Zoom meeting is secure?**

Zoom will allow you to lock down your meeting to mitigate the chances of anything inappropriate taking place. These include restricting screen sharing, in-meeting chat, the ability for attendees to unmute themselves, and the ability for attendees to rename themselves. All of these controls
can be managed prior to the meeting even starting and within the meeting itself by the host. For more information, please go to the Zoom security page here.

**How can I prevent interruptions in my Zoom Meeting or Webinar?**

There are a few types of interruptions that can be prevented using settings in Zoom, which are highly recommended anyway. These include:

1. Turning off Chat and Private Chat
2. Turning off File transfer
3. Clicking Mute All (at the bottom of the Manage Participants window) and unchecking the ability for participants to unmute themselves as soon as the meeting begins (then you unmute only those who should be speaking).
4. Turn off Screen Sharing (or set it to Host Only)
5. Turn off Join Before Host (and even better is turning on the Waiting Room and admit participants one by one as you identify them).
6. Turn off Play sound when participants join or leave (to avoid audible tones)

**What's the difference between a Meeting and a Webinar?**

A Zoom Meeting works well for smaller groups where many of the participants need to interact with each other, for example, during a staff meeting or working meeting. A Zoom Webinar works best for larger groups where a few participants will be engaging and the rest of the participants will be viewing the meeting. For public meetings, we recommend using Zoom Webinar. For more details on the difference between meetings and webinars, please see this page.

While Webinar attendees join in “Listen & View Only” mode, they can be unmuted to be able to speak. If they have any documentation to share with the group, they can send it to the host, and the host can present it.
Zoom for Public Meetings Set Up Tips

1) In Advance of Meeting, identify and make a list of all participants that are expected to join, either by name (Zoom ID) or phone number. In some cases, the default Zoom ID of a participant may be generic (e.g. iPhone8), so it is helpful to ask participants to change their Zoom Name to something more easily identifiable. Print out this list and have it ready to check off people as they are admitted when the meeting starts.

2) Set up your Zoom Waiting Room message (this only needs to be done once per account, unless you need to change your message). This message will be visible to anyone joining your meetings via Zoom and can be done in the settings under Waiting Room. This is what Providence’s Waiting Room message looks like right now on a smartphone:

```
2:27  496-453-340  Leave
Invited Zoom users will be admitted soon. Otherwise, see below.
City of Providence - Board of Contract and Supply - Monday, April 13, 2020
You may listen to this meeting by dialing 1-646-676-9923 and entering the meeting pin. Invited Zoom users will be admitted to the meeting when it begins. Otherwise, if you wish to view this meeting or any City Council meeting recordings from the past, please visit our YouTube Channel at: https://bit.ly/pvdmeetings
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3) Physically set up in a location where you have room for any materials you may need, and ideally with your computer connected to a large monitor, to be able to see as many participants as possible on your screen.

4) Launch Zoom application and “Start Meeting” at least 15 minutes early.

5) Choose Phone Audio option and dial in from phone/speakerphone (better audio as long as there is no echo in your location).

6) Choose Mute All (bottom of participant panel), and disallow self-unmuting.

7) Admission process for all Entity Participants in the Waiting Room:
   a. Identify them by Zoom Name or last digits of phone number
   b. Admit them one at a time as quickly as possible (you may decide to start the meeting more than 15 minutes early if you can’t finish before meeting time)
   c. Rename them if necessary
d. Un-mute them (if they need to be unmuted at start of meeting)
e. Ask them to test their audio to make sure you can hear them (check for the audio icon (either phone or microphone) next to their name in the participant panel
f. Provide them recording access if necessary
g. Add them as Co-Hosts if necessary

8) When everything and everyone is ready to start the meeting, admit all public participants, including phone-only participants (they remain muted) quickly one-by-one

9) Notify Chair to start meeting while:
   a. Immediately Starting Zoom Recording (choose to save to Cloud or Computer)
   b. Immediately Starting Digital Audio Recording (if placing a physical digital audio recorder next to your speakerphone as a backup recording)

10) Announce muting protocol: If you have enough first-time audible participants in the meeting, ask the chair to explain a few items of protocol:
    a. How important it is to mute oneself when not speaking
    b. Who is visible on the meeting and how to make it known you wish to speak
    c. You may be muted by the host temporarily if the host determines that a significant amount of background noise is coming from your microphone

11) Remain on the lookout for additional attendees joining the meeting. They will pop up at the top of the Participant List in the Waiting Room. Admit anyone joining via phone immediately and only admit recognized Zoom users. Rename recognized users if desired.

12) Temporarily mute any participants who appear to have a lot of background noise (the box representing them on the call lights up when they are “speaking”) and don’t forget to unmute anyone who needs to speak.

13) Manage interaction with public participants. Identify any expected participants and unmute them to allow them to engage when appropriate. For unexpected participants, identify them (could use the Raise Hand function in Zoom) and unmute them when you are ready for them to speak. Be prepared to mute them if any inappropriate content is shared.

14) Pause the Zoom recording if a recess or pause in the meeting occurs. This may not be possible on any live feed. Stop the Zoom recording and the live feed when the meeting has been adjourned.

15) Download the recording and transcript for review and public posting as applicable.
Helpful Trainings and Materials

Trainings
Live Webinar Training for Users and Admins These are daily or multiple times a week and 30-60 minutes.

Recorded Training

Short Video Tutorials (1-2 min)

Materials
Zoom Resources Homepage

Webinar Resources Homepage

Set Up Your Waiting Room Securely

Host and Co-Host Controls

Breakout Rooms

Accessibility Details