

Chatham Masonic District

Zoom Meeting Playbook

Introduction

Zoom meeting capability is now available for all District and Lodge meetings. This cutting edge technology will allow us to commence rebuilding those lost connections with our in our District and beyond, since the suspension of Lodge last March. As well, given recent announcements by Grand Lodge, that specific items of Lodge business may be conducted virtually, we have further reasons to gather our membership together.

Playbook Purpose

The intent of this playbook is to assist meeting Convenors by providing a step by step understanding of how to gain platform access to and how the tool can benefit Lodges. It will also define and clarify the expectations and requirements of all participants participating in virtual meetings. There are unique protocols and essential guidelines that must be followed by all participants of a Zoom meeting, not only to maintain the security of our meetings but also to ensure we are in compliance with Grand Lodge regulations pertaining to same.

Who within the District may use the Platform?

All Lodges, Lodge event planning committees, the C.D.M.C., the D.D.G.M. and other District bodies or groups such as District Mentorship or Masonic Education. Any individual members or other groups or bodies within the District will contact the District Co-ordinator to request use of the platform. The District Zoom team will prioritize all requests and share the Zoom Calendar via the District Website.

Platform Access

Access is simple. Contact (via email), the District Zoom Co-ordinator, K. Michael Smith to schedule a meeting date and time. A District Host will be assigned by the District Zoom Co-ordinator to facilitate your meeting, based on availability.

The assigned District Host will OPEN your meeting, ADMIT all participants, START your meeting, ENSURE all rules and housekeeping items are reviewed prior to the meeting commencing and further that they are followed by all participants throughout the meeting. They will enable use of all audio, video and other presentation functions including screen sharing. The District Host is also responsible to CLOSE the meeting at the scheduled time. This structure eliminates the need for each Lodge to have a trained Zoom expert and makes it very simple and easy for Lodges to start using Zoom.

Zoom Co-ordinator & District Hosts

Zoom Co-ordinator

W. Bro. K. Michael Smith
k.michaelsmith@gmail.com

Meeting Host

R.W. Bro. Marc Hewitt

Meeting Host

W. Bro. Wayne Passmore

Meeting Host

one additional host is required

Your Zoom Meeting

Do's and Don'ts for a Successful Meeting:

- All efforts should be made to schedule meetings as far in advance as possible with the District Co-ordinator to ensure the day and time you desire is available
- Don't advertise a meeting date and time until confirmed with the District Co-ordinator
- Advertise well in advance, such that ALL of your membership is given the the best opportunity to attend and participate
- Lodge Zoom meetings must have an agenda that it is shared with the District Co-ordinator at the time of booking so that we can best assist you in making your meeting a success
- Meetings are conducted by the Convenor not the District Host, and they should be well versed in the agenda and have the meeting planned to flow smoothly and in a timely manner

Do I need to send out a summons for a Zoom Meeting?

In the case of meetings which are educational or strictly fraternal in nature, a summons is not required. However for your members not using email, why not consider a monthly or periodic newsletter to let them know about Zoom meetings and other happenings within their Lodge. If you're already doing a newsletter monthly then you can simple add your meeting notice to that if you haven't already.

If a Lodge is planning to hold a meeting which will involve official Lodge business being conducted under the then current Grand Lodge regulations, then yes, a summons must be issued. Summonses issued in these circumstances must fully comply with the Constitution and Lodge by-laws.

Considerations for Planning Meetings

- Hold Lodge meetings on regular Lodge nights and times, where possible
- Alternative dates and times will be available on a first come, first served basis
- Meetings should not exceed 90 minutes to maintain participant interest and attention.
- Meeting Convenors are responsible for all meeting content, including introductions
- All meetings should START at 7:30 or 8:00 pm*
- District Hosts will OPEN meetings 15 minutes prior to the stated START time and will admit guests individually via a feature called the "The Waiting Room" until the stated start time
- Participants are to be encouraged to join as soon as the meeting OPENS so that the meeting STARTS on time
- **OPENS** is defined as the time the District Host opens the meeting room
- **STARTS** is defined as the time the Convenor starts the actual meeting agenda
- **ENDS** is defined as the time that the District Host ends the meeting for all participants
- Polls (surveys) may be conducted both during and following the meeting to gauge key responses to the meeting. The Zoom Co-ordinator will review with you at time of booking any poll questions you may want to present to your attendees.

*(*if your meeting requires a summons, then you are required under the constitution to conduct your meeting on your stated day and time. If no summons is required for your meeting, you can hold your meeting whenever you wish in consultation with the District Co-ordinator)*

Suggested Meeting Flow

- 7:15 District Host OPENS room
- 7:30 District Host provides housekeeping Remarks and Reminders
- 7:35 District Host introduces Convenor
- Convenor opening remarks and reviews agenda for meeting
- Introductions and remarks, where required, of PGLO's
- Business Agenda (only those allowed by Grand Lodge)
- Educational Element/Presentation
- Q&A
- Optional - Round Table for all attendees, if manageable or desired (give each participant a few seconds to speak)
- Closing remarks including where required, a reminder of next meeting date and time

So, how do I schedule a meeting and distribute the meeting links?

1. If two lodges, that both meet the same evening, wish to hold a virtual meeting on their regular meeting night, it will be their responsibility to reach an agreement with one another as to which Lodge will use the date in question for their meeting.
2. Next, contact the District Co-ordinator to determine if the date and time your lodge desires to hold a meeting is available.
3. The District Host will create your event and forward the necessary Zoom links to the requestor.
4. Once availability is confirmed with the District Co-ordinator, the Lodge can then begin to promote their meeting.
5. It is recommended that meeting links be distributed electronically as follows:
 - First, send out when the meeting is booked
 - Second, 3 days prior to the meeting date
 - Finally, again on the day of the meeting*(Invariably changes to the link may occur or members may lose the link)*
6. At the time of booking, lodges will have the opportunity to request a recurring meeting.
7. If a Lodge decides not to use any booked and confirmed meeting, they are required to notify the District Host ASAP to cancel the booking. Keep in mind your District Host is volunteering their time to host your meeting.
8. It is the requestor's responsibility to distribute the meeting link. Links must not be shared on any public forum such as Facebook, Instagram or Twitter.
9. Membership who will not receive the link electronically should be advised of the meeting via other methods, ie: voice call or voice mail. *(if your meeting requires a summons, then they must receive a hard copy in the mail)*

Protocol & Essentials for Zoom Participation

While lodges are permitted to hold virtual meetings, the scope of what business may be conducted shall at all times strictly adhere to the directives routinely issued by Grand Lodge. For your convenience please check the Chatham District Masons website regularly for the latest updates and requirements in this regard.

The decorum and requirements practiced in tyled Lodge meetings are to be the norm for Zoom meetings as well. For the sake of clarity, participants are requested to refrain from alcohol consumption during the meeting.

Additionally, keep in mind the following regarding Zoom meetings:

- a) All participants must use their actual first and last names as their screen names. Names such as “Joan’s iPad, or User 123” or nicknames for example are not acceptable.
- b) Anonymous participants will not be admitted by the District Host
- c) Participants not complying with above will not be admitted to attend the meeting at the sole discretion of the District Host.
- d) Unacceptable screen names will be altered by the District Host, where able
- e) Participants joining by phone will be required to record their name and Lodge name and number in order to gain admittance.
- f) What is not appropriate to discuss or take part in, in open lodge is also not appropriate for Zoom meetings. (Politics, religion, consumption of alcohol etc.)
- g) While it is anticipated that all participants will interact in a respectful and appropriate fraternal manner, District Hosts are responsible to protect and preserve the peace and harmony of the meeting, and to ensure that it complies with Grand Lodge regulations.

What happens if a participant does something inappropriate during a Zoom meeting?

FIRST - Any participant not in compliance with the required decorum will receive a private Chat message from the District Host advising them to refrain from further such instances. The District Host will instruct the Convenor that this message has been sent.

SECOND - Further occurrences by the same participant will result in the District Host either muting their audio, and/or turning off their video or placing them in the waiting room temporarily, depending upon the circumstances

THIRD – Further occurrences will result in the offending party not rejoining the meeting.

- h) No ritual is to be performed, discussed or referenced.
- i) Any education presented must be suitable for Masons of any rank.
- j) The Zoom Co-ordinator is to be made aware of any special guests that are expected so that the District Hosts don’t leave anyone in the waiting room because they are unknown.
- k) District Hosts may at their sole discretion, agree to extend the duration of a meeting should the Lodge require additional time, notwithstanding the suggested 90 minute duration. Conversely if the District Host cannot extend the meeting time, they will message the Convenor during the meeting that it will be a hard stop at the planned **ENDS** time

- l) Convenors should know how to use the CHAT feature so that the District Host and participants can send messages inside the platform.
- m) Only the District Host will have the ability to message all participants with a single message. As a Convenor if you want to message all participants, you will send your message to the District Host for distribution. The Convenor can message individual participants and participants can do the same.
- n) Lodges and members are asked to practise proper protocols regardless of the informality of the meeting including introductions of Grand Lodge Officers. (The Host will remind the Convenor via the CHAT feature but will not make the introductions)

Assistance with the Platform

Finally, any member who requires assistance in order to be able to participate in the Zoom meetings should ideally reach out to their WM or Lodge secretary for assistance.

If someone else who attends Zoom meetings perhaps give them a call. If all else fails and you still require assistance you can reach out to Bro. Kevin Jakubec @ kevinsjakubec@gmail.com

What if I can't join by Video

Please remind your members that even if they don't have the ability to join with video, participants can also join by toll-free phone lines and that information is provided with the Zoom invitation. For participants who wish to join by video but need to preserve data, they can simply turn off their video while still see what the Convenor is sharing on screen. This will assist members who may have a slower connection speed or bandwidth limitations on their account.

Training Resources

A Resources area is now provided on the District Website listing some great up-to-date and relevant training resources to help you join the world of Zooming. We look forward to seeing you soon!