

# Wahnapi'tae First Nation Videoconferencing Policy

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## 1. Rationale

### a. General Overview:

In light of the ongoing challenges posed by the onset of COVID-19, WFN requires an administrative-wide solution to videoconferencing that suits its many needs, and for community engagement/information purposes in particular.

As such, WFN will endeavor to maintain an active license for a suitable videoconferencing solution for as long as such a service is deemed necessary.

At present (i.e. November 2020), the selected solution is Zoom Pro, with the Webinar add-on.

Please note that, while this policy discusses videoconferencing more broadly, it is intended specifically to address WFN's needs on the issue of community engagement/information. Diversions from that perspective are indicated below as necessary.

### b. Needs Outline/Analysis:

The restrictions resulting from COVID-19 mean that, at present, WFN essentially requires videoconferencing for two specific purposes:



1. Virtual meetings with **internal teams or external stakeholders**, and
2. **Community engagement or information sessions**.

While there is potential for the development of alternative uses of videoconferencing technology going forward, these two are the primary concerns of WFN's technology needs on this front.

Both items have specific and distinct requirements: while internal/external meetings don't require moderation because of the level of trust and accountability inherent to those groups, community engagement or information sessions require a greater degree of moderation to equally protect the participants, the organizers, and the speakers. The latter also has additional requirements, which are to be outlined further in this document.

While both must have extended (or minimal) time limits, must be easy to use for both hosts and participants, and must have a manageable cost, both items also have their own specific and distinct requirements. These will be outlined as follows:

1. **Internal/external meetings** simply require broad access for those who do not have a license, and the ability to set private meetings. They do not require advanced moderation tools because of the level of trust and accountability inherent to those groups.
2. **Community engagement or information sessions** require a greater degree of back-end moderation tools so as to equally protect the participants, the organizers, and the speakers, and to ensure that proceedings are able to flow in an orderly, respectable fashion. This should include the ability to control how individuals are able to communicate within the meeting, to allow or exclude individuals from joining or participating (i.e. members only, if necessary), and allow panelists/organizers to manage the flow of questions from the participants/audience.

These sessions also require software solutions that offer extended time limits (or none), the ability to host 500 or so individuals, and to both stream or record the meetings for future sharing or transmission. If possible, it should also offer the ability to generate registration pages to allow for greater ability for WFN hosts to prepare.

It is therefore worth noting that, given the distinct needs for each group, it is possible that multiple software solutions may be required. For instance, while the default Teams license as already acquired by WFN (as well as the free version of Zoom) does serve the organization's purpose for simpler **internal/external meetings**, it remains unsuited to the more complex requirements that are demanded of **community engagement or information sessions**.

Given these specific requirements, and following extensive research and outreach to other First Nations communities with similar needs, it is determined that, at present, Zoom Pro with the Webinar Add-On is the solution to be selected for WFN's approach to virtual community engagement.

Departments who wish to continue to use Teams for lower-level **internal/external meetings** may do so; however, any and all **community engagement or information sessions** or related efforts must be made through the Zoom functionality as outlined below.

The efficiency of this system will be reviewed on an ongoing basis so as to determine whether it is fully meeting the specific needs of WFN.



## 2. Usage

### a. User and Process Overview:

The number of users of the system must be carefully managed, given the costs associated with adding additional users.

While Zoom Pro licenses (which allow for general meeting hosting and management) are comparatively low-cost, the same is not true of Webinar licenses. The latter type of license (which allows for oversight over the Webinar add-on) bears a much higher cost.

As such, WFN will initially hold a single Webinar license, whose administration will be overseen by the Communications Coordinator (though others may be temporarily acquired for assignment should departmental needs overlap). However, broader setup and management of individual community engagement or information session events will be deemed the responsibility of whichever department is seeking to host said event, and those departments will be assigned individual Zoom Pro licenses for that purpose.

In other words, the Communications Coordinator will assist in assignment of the Webinar license to departmentally assigned staff, who will then have the responsibility of scheduling, administering, and hosting the event proper.

### b. User Account Assignments:

So as to allow WFN to maintain orderly and organized use of the system while simultaneously guarding against unnecessary costs, the number of official WFN Zoom Pro licenses will be restricted on a departmental basis.

As per above, the Webinar license(s) will be managed per the Communications Coordinator, who will assign it to staff upon official request. Once assigned, staff will schedule their event and then forward themselves host permissions to allow them to launch the event in case the Webinar license must for some reason be reassigned for additional scheduling. However, these permissions can only be transferred to a user Zoom Pro license; as such, these will be required for each department.

In other words, a departmental Zoom Pro license will be assigned to each department's Director per the Communications Coordinator, acting at the direction of the Executive Director.

This means that each Director will then oversee administration of the Zoom Pro license for their respective department. Staff wishing to request the use of the departmental Zoom Pro account for any purpose – whether for community engagement or information, or even a regular meeting – will have to be forwarded to the Director responsible for their department for their subsequent approval.

Note that additional Zoom Pro licenses can be added on a monthly per-use basis should they be deemed necessary (i.e. for multi-person co-hosting, etc.). Separate licenses may be acquired and assigned for special circumstances or special projects, or other general Band Office sessions that are not under the purview of any particular department.

Licenses will be assigned to each department Director as an Admin role, with specific modifications to the permissions of that role. In particular, Admin roles will be able to manage



Groups and assign additional roles to users (to allow for multi-person management of a meeting, if required) as well as various meeting-level capabilities; however, any functions relating to account-wide settings (such as billing, signage, and others) will be disabled. Any changes that are required from departments within those restrictions should be made directly to the Communications Coordinator.

A depiction of this structure is available in [Appendix A](#).

Note also that, due to the complexity of the event setup and the ongoing requirements of managing them, additional Webinar licenses can be acquired on a monthly basis should more than one department need to host a community engagement or information session. Note that each Webinar license allows for a department to schedule multiple events, so temporary acquisition of Webinar licenses will be done on an as-needed basis at the discretion of the Executive Director and as administered by the Communications department.

### **c. Usage Parameters**

Specific use of all Zoom licensing, including the departmental Zoom Pro licenses, should be relegated for official Wahnapiatae First Nation administration business only. Use of this technology for personal purposes is forbidden, as user adjustments made on personal time may inadvertently affect departmental settings.

That aside, it has already been established above that while Teams may continue to be used for lower-level internal/external meetings, it is not to be used for **community engagement or information sessions** or related efforts. All virtual community engagement/information sessions conducted by WFN will be handled through Zoom Webinar functionality. This includes consultations, town hall sessions, and all other efforts where direct member feedback is being sought for WFN administrative purposes.

In time, this technology could be applied to other community engagement / information purposes, such as allowing members to view livestreaming portions of Chief and Council meetings which are not considered in-camera. This and other opportunities will be investigated over time.

Alternatively, should individual departments wish to use their assigned Zoom Pro license for **internal/external meetings** in lieu of Teams, they may do so, provided it has been approved by the departmental Director in advance, and that it is not already in use at that time. This would be appropriate for staff-to-staff meetings, WFN committee meetings, or meetings with external stakeholders; in other words, meetings where there is a controlled, small-number participant list which is largely held internally accountable.

## **3. Scheduling**

If a department wishes to host an internal teams / external stakeholder meeting requiring only the Zoom Pro license and not the Webinar add-on, it needs only approval by the departmental Director and organization within the department proper for use of the departmental Zoom Pro license; no additional setup by the Communications department is required.

If a department wishes to make use of the Webinar add-on, however, an official request bearing whatever information is deemed necessary must be made to the Communications Coordinator, who will temporarily assign them a Webinar license. From there, the requesting departmental



user account will be able to use the Webinar license to schedule and configure the event; they will also be able to designate themselves as the "alternative host," which will defer all hosting functions to the departmental level. From there, it is the responsibility of the department to manage the all pre-event items, such as registration, as well as the event proper, as outlined in the Meeting Responsibilities section below.

Note that if other departments require the use of a Webinar license to schedule and manage their own events and none is available, additional Webinar licenses can be temporarily acquired on a monthly and as-needed basis to accommodate any overlap.

Please note that only Zoom Pro-level licensed accounts can be designated as alternative hosts, meaning that departments must use their assigned License to operate their Webinar event if for whatever reason they do not have access to the Webinar event they scheduled; details on how directors can add staff to the departmental Zoom roster and transfer the departmental license to them can be found in the WFN Zoom Webinar Handbook.

Again, see [Appendix A](#) for a view of this structure.

#### **4. Responsibilities**

Each department is responsible for scheduling, organizing and hosting any meeting or event they wish to establish.

The sole exception is with regards to any event marketing that will be carried out in consultation and conjunction between Communications and said department. Following the event, Communications will also assist in the promotion and distribution of any recordings.

Outside of those parameters, however, it is important to note that individual departments will be responsible for the following throughout the before, during, and after phases of any Webinar/meeting:

##### **1. Before:**

- Scheduling and configuring the event,
- Handling registration,
- Organizing the appropriate speakers,
- Assigning panelist roles to speakers through the Zoom interface in advance,
- Determining and assigning any other roles as necessary to staff in advance (i.e. additional co-hosts)
- Preparing any and all presentations and material associated with the event,
- Working with Communications to promote the event (and registration, if necessary),
- Working with Communications to build live streaming capabilities / setup to other platforms such as YouTube (if desired), and
- Coordinating any physical and technological setup required to carry out the actual Webinar.

##### **2. During:**

- Initiating the meeting/Webinar, with all relevant settings,
- Ensuring the meeting is recorded to the cloud (if appropriate),
- Introducing the event and the speakers,



- Managing flow of speakers,
- Building and managing polls (if desired),
- Managing what attendees see (i.e. screen sharing, chat options, etc.)
- Managing Q+A / participant questions (including working through questions from chat, live questions, unmuting to allow for audio, or elevating to Panelist to allow for video, etc.),
- Stopping the broadcast

### **3. After:**

- Sharing with Communications any ideas or feedback on how the handling of the event could have been improved, so that best practices can be built and shared throughout the administration,
- Issuing follow-up emails to attendees with links to the cloud recording (if desired and if emails are on hand through registration),
- Work with Communications to determine appropriate distribution for the cloud recording, if appropriate (i.e. social media / newsletter, general public, etc.), and
- Generate any relevant post-event reports from the software back-end, if desired

These responsibilities are likely to change as usage of the technology evolves and various best practices and procedures are determined.

## **5. Zoom Webinar event management flow**

1. Department Staff requests webinar approval from Director
2. Director transfers departmental license to Department Staff
3. Once approved, Department Staff requests Webinar license access from Communications
4. Communications assigns Department Staff as the Webinar license user
5. Department Staff schedules the webinar
6. Department Staff builds registration (if necessary)
7. Department Staff invites panelists, attendees
8. Department Staff builds webinar polls/surveys (if necessary)
9. Department Staff adjusts Q+A settings (if necessary)
10. Communications is then notified and assists in promoting the event via whatever process identified by Department Staff
11. Department Staff hosts the event
12. Department Staff views/generates/shares reports and recordings as desired; Communications may assist with this as required
13. Department Staff shares thoughts / best practice ideas with Communications

## **6. Data Centralization**

Another advantage of the Webinar account being controlled from a central point within the administration is the ability to have all the relevant digital information generated by individual events housed within a space outside of individual departments. This frees up departments from the responsibility of creating and forwarding this data, and allows the administration to generate this data independently as needed.



Once they have completed, individual Zoom Webinar sessions can be revisited by staff at the request of the Executive Director, or departmental Directors to generate the following data:

- Registration information (i.e. a list of registrants and their details)
- Attendees (i.e. a list of details about each attendee, assuming they've provided any)
- Performance (i.e. engagement statistics on registration, attendance, and feedback)
- Q&A (i.e. a list of all questions and answers from the webinar, though the latter will only appear in a report if the answers were provided via text and not by a panelist on video)
- Polling (i.e. results of any polls that were conducted by the host during the session)

Reports for each session will be generated upon request as outlined above.

This centralized approach also means that recordings for each session – a function that will be implemented into departmental use procedures – will also be housed within the Webinar account and will therefore be available to the administration via the Communications Coordinator. Access to these recordings will be managed via the Communications Director, and distributed as deemed appropriate by the Executive Director.

## **7. Review and Revision**

This document will be reviewed on a quarterly basis, and will next be examined in February 2021.

These reviews will offer an opportunity to determine whether WFN's needs are evolving, how the current technology is meeting those needs, and what responsibilities or procedures can be set into place within policy (assuming they are not appropriate for Standard Operating Procedure documents).

This document was last updated Nov. 25, 2020.

It should be reviewed again Feb. 22, 2020.

# Appendix A

## Structure of WFN Videoconferencing License Distribution

