Railfuture Zoom Accounts Protocol

Virtual and hybrid meetings are an essential part of Railfuture's campaigning & interactions with its members. For the online element, our preferred solution is "Zoom" and at the time of document preparation, Railfuture pays for one account and has routine access to a second that is paid for by a Director.

This protocol supports, and is subservient to, the Railfuture Meetings Policy; as regards that Policy, the annual costs of purchasing Zoom services is considered out of scope, so virtual meetings that using the Zoom Meetings functionality for 100 or less attendees meet the definition of "Where a meeting involves no cost to Railfuture in terms of room hire costs, or the claiming of any expenses including travel, then the considerations below do NOT apply".

Principles for hosting virtual meetings

(These include the virtual part of hybrid meetings)

1. If a member or guest has access to a suitable service, subject to #2, we are happy to use such services, provided it is easy and convenient for the individual to provide this help to us. We should not put anyone under any pressure to help us in this way, but for Branch Committee and Group meetings it can be the preferred choice as it frees capacity for other meetings.
2. Where we are publicising the URL for the meeting to members of the public on social media, on our website etc, the very strong preference is that a Railfuture controlled account is used[1]. This is both to deliver a branded experience when booking and to 'guarantee' that we will not need to change the URL because a non-Railfuture owner has to withdraw their offer.
3. We operate on a first come, first served basis; once reserved, a meeting booking will not be cancelled[2] [3]. The definition of "reserved" is a timed & dated booking present in the Zoom Meetings list.
    *   We will lend our accounts to Rail User Groups (and for other Rail Campaigning matters that further Railfuture's objectives[4]) on the same basis on request (but we not give them access to the account details – an appropriate Railfuture Branch Committee / Group member must be the technical host for the session).
4. Organising Hybrid meetings (part in person, part online) is considered acceptable, but the preparation effort and level of equipment needed, both for the online hosting and within the room should not be underestimated. Where hybrid is being considered for a public or other important meeting, it is recommended that a discussion is held with the Railfuture Communications Director as part of the preparation process.

> **Summary:**
> 1. Using borrowed accounts is fine for Railfuture only meetings, but to be avoided for public meetings.
> 2. First come, first served (across both accounts, not just the one allocated).
> 3. Self-service.
> 4. Your meeting (or a proxy booking) to be visible as a specific time & date on zoom.us/meeting for it be considered a valid booking.
> 5. Make sure your description is clear as to who is to be contacted.

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[1] Where a meeting is organised jointly, this does not apply to using the other organisation's account.
[2] That is not to rule out the possibility that, by negotiation, a small meeting, such as a committee meeting agrees to time shift, or to switch to another account to allow another event to take place at the best time.
[3] However, it will be a routine activity that a host may be contacted to double check that a booked meeting is still happening.
[4] Use for other purposes is not totally ruled out, but permission to do so should be made to the Finance/IT & Communications Directors – a positive response from one of them is sufficient. In making their decision they will consider tax and other matters.

5. Paid for accounts will normally be purchased on an annual basis for up to 100 attendees; additions such as for Webinars will be paid for on a case by case basis as needed. Where Railfuture is bearing the cost, the strong preference is for a Railfuture owned Debit card to be linked to the account.
6. Our process is designed to operate on a "trust" basis; if this proves an issue (eg bookings "disappearing" or costs being incurred), the process is likely to be altered and become more bureaucratic and slower to respond in confirming availability.

Note: There are many other services offering virtual meeting hosting, including Google Meet and Microsoft Teams. Where offered use of these products, it is perfectly acceptable to use them, but, in the case of member and public meetings, considerable caution is urged as those less comfortable with technology may struggle to install and use extra software.

The process

Branches and Groups will be allocated to one of the two accounts as the first calling point; if necessary, the second calling point can be called upon for use and such requests rank equally with requests from those directly allocated to the 'other' calling point.

The process is as follows:
1. The master record is held within each Zoom Account.
2. Anyone wishing to book a Zoom Meeting contacts the relevant Controller and requests login details (of if previously advised of them, starts by attempting to sign in with the previously provided details).
   - If the Webinar Add-on, or other additional cost is needed, then consult with your nominated Controller about this this; they will discuss options with you (eg the 'other' account may already be planned to have this Add-on, so a switch to that account is sensible). Be aware that any costs will be allocated to the relevant Branch (et al).
3. Sign on to the Zoom website, and if the slot is available, book the slot, following the protocols below (note: the website has better functionality and visibility of meetings vis a vis the App).
   - Preferably, leave at least a 15 minute gap between meeting bookings, except for pairs of Committee meetings.
   - For public / large Meetings, booking a 15 minute 'keep free' session before the main meeting is recommended (potentially a 'ditto' as regards possible overruns).
4. If the account already has a booking for the preferred time, the first normal step will be to contact the other Nominated Controller. Provide them with the time & date in case they want to perform the very first step of confirming availability and making the booking if the time slot is available.
5. If slots are booked on both accounts, then, in conjunction with the controllers, contact the organisers with bookings to confirm that the booking is going ahead, and dependent on the type of meeting, the possibility of the time shift (remember we operate first come, first served).
6. It is strongly recommended to login to the relevant account in the App 24 to 48 hours in advance of the meeting using the device that will host the meeting to:
   - Make sure that the password hasn't been unexpectedly changed.
   - Deal with the possibility that Zoom will want to undertake 2 Factor Authentication (2FA) before completing sign on. A Railfuture email account is available that receives all Zoom emails for the account, including 2FA codes and this should be logged onto to retrieve the code. Note: this can happen when either a device is new to the account or where it hasn't been used for some time; there have been occasional issues with delivery speed of these emails, so complete the first attempt in plenty of time in case there needs to be a second attempt.
   If it isn't possible to gain access to the device that will host the meeting in advance, a contingency plan is recommended; one option is to start the meeting on a pre-tested

smartphone or tablet, then once the meeting device has joined the meeting as an attendee, promote it to Host or Co Host.

Zoom bookings standard

To be "legitimate", a Zoom booking needs to meet these criteria:

1. Be a One Off Meeting Booking (see below re Webinars).
2. Be a recurring Meeting at a Scheduled time (eg 6pm on the first Thursday of the month) and for it to be less than 12 months old (since the first meeting in the series).

The following Bookings are not considered legitimate (as a solo booking):

1. Recurring Meetings on an Indefinite or No Fixed Time basis; solution: It is fully acceptable for these to be used, but each time such a meeting is held, a separate one off booking needs to be made to reserve the slot with a description such as "xxx Placeholder only – Indefinite URL in use".
2. Scheduled (Time Meetings) more than 12 months since the first meeting (including indefinitely repeating ones). It is recommended, but not mandatory, that a new Zoom Meeting ID is created for each annual season (so as to help avoid the clutter of old, no longer in use, meeting bookings ~ and also because it is sensible to change meeting URLs at least occasionally for privacy).

When booking a Webinar, also make a concurrent Meeting booking as well (as Webinars do not appear in the [Meetings list](#), so a proxy booking reservation is needed for visibility).

Other matters of note:

1. Ensure the Description is clear who is to be contacted to discuss the booking. If the person's email address is not a Railfuture one, then this should be included in the Description; if Zoom Registration features are to be used, the address included for Registrant queries will suffice.
2. Users of the Zoom account may change meeting options as they wish (eg use or not the Waiting Room facility, including in-meeting features) but no changes should be made to the Account profile, including to the Password.
3. Meetings may be recorded to the Cloud, but the recording should be downloaded within a week and the Cloud copy deleted.
4. Only the Nominated Controller should incur costs by, eg, enabling the Webinar add-on.

Branch & Group users

Each Branch or Group that is issued with account details[5] should aim to restrict knowledge of them to no more than three individuals (eg [but not necessarily], the Chair, the Secretary and individual designated to routinely undertake the main Host Role).

It is recognised that all three individuals may be unavailable for a specific meeting, in which case details can be shared with another Railfuture member. If this happens, advise the Controller.

Account details and Passwords must only be shared with members of Railfuture; where the Account is being loaned to (eg) a Rail User Group, a Railfuture member must provide the Technical Hosting role[6].

If the Password is changed, the Nominated Controller's responsibility is limited to informing imminent meeting hosts.

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[5] This is separate to adding Co-Hosts during a specific meeting; this can be done as convenient and is not restricted to Railfuture members.
[6] In the past, it has worked well when the Account Controller starts the meeting, appoints two (for safety) meeting leaders as co-hosts and then departs.

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Account nominated controller

Each Railfuture account will have a nominated controller. The role of the controller is to:

1. Own the account; as part of this they should change the Password from time to time, as they feel appropriate; a key factor being any suggestion that the account is at risk of misuse. The password should not be easy to guess.
2. Provide the Password on request to Branch / Group Chairs, Secretaries or others nominated by Branches / Groups.
   - For Branches / Groups allocated to the "other" account, the controller may prefer to check availability and make the booking as a first step, rather than extend the list of those in the know only for it be discovered the account is already in use.
5. If the Password has to be changed, the core publicity requirement is to inform hosts of imminent forthcoming bookings.
3. To assist Branches and Groups as needed to use the Zoom account they control. This does not extend to any expectation that they will host meetings but could include a training / test session at a time of mutual convenience.
4. To review the schedule of meetings occasionally to remove recurring bookings that are believed no longer linked to an actual meeting (such removals should be accompanied by advice to the designated contact).

Allocation of Branches & Groups to accounts

Account	**London & South East**	**Yorkshire**
Contact	Neil Middleton lse-social@railfuture.org.uk	Andrew Dyson yorkshirezoom@railfuture.org.uk
Email account for Zoom Codes etc[7]	lse-social-user@railfuture.org.uk	yorkshirezoomuser@railfuture.org.uk

Branches	• East Midlands
	• London & South East
	  o Eastern
	  o Herts & Beds
	  o Kent
	  o Surrey
	  o Sussex & Coastway
	• Thames Valley
	• Wales
	• Wessex
		• Devon & Cornwall
		• East Anglia
		• Lincolnshire
		• North East
		• North West
		• Severnside
		• Scotland
		• West Midlands
		• Yorkshire

Groups	• Passenger
	  o European Passenger
	• Communications
	  o Editorial Group / Railwatch
	• Membership
		• Freight
		• Infrastructure & Networks
		• Finance & IT
		• Governance

National	Board National Webinars	

Reminder: All Branches and Groups can use both accounts; this listing simply defines which account to start with.

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[7] Contact the Controller for the Password; do not use this account for queries etc as it is unlikely to be regularly monitored.