



TRUSTED SERVANTS WORKSHOP

San Mateo AA Central Office

- A Workshop for AA members wanting to learn more about Meeting Secretary, Treasurer and Literature and other Trusted Service positions

Workshop Outline

- **Kinds of AA Service Commitments**
 - Group Focused
 - General Service Office (US and World)
 - Other intergroup Service Commitments

- **SM Central Office –an Underused Resource**
 - Where is the Central Office anyway?
 - What does Central Office Do?
 - San Mateo AA’s Website – A marvelous Trusted Servant’s Resource!
 - Teleservices for San Mateo County
 - Zoom Meeting Support for groups in San Mateo County

- **Group Focused Commitments**
 - Meeting Secretary
 - General information and duties of a Meeting Secretary
 - Running a meeting (before, during and after)
 - Integrating ZOOM into AA Meetings
 - Differences at larger AA “Fellowships” (WBAC, “Eaton”)

 - A Group Treasurer
 - What are the financial responsibilities of an AA Group?
 - What does the Treasurer do and how is it done?
 - How Central Office and other AA Groups are supported by 7th Tradition
 - How H&I contributions are different from 7th tradition contributions
 - How “on-line” meetings changed what Treasurer do

 - A Literature Coordinator Commitment
 - How does literature support AA’s purpose?
 - What does the literature person do?
 - What role does Central Office play?

Appendices

- Setting up a ZOOM account – a Walkthrough
- Running on-line AA Meetings using ZOOM
- Hosting a ZOOM meeting – a Walkthrough
- Recommended Zoom Best Practices – one group’s adopted best practices

A Broad Look at AA Service Commitments

✓ *Service Commitments* focused within your group

These service commitments are usually established by group consensus.

- Meeting Secretary
- Group Treasurer
- Literature Person
- *Other informal meeting service commitments*

✓ Services focused on direct support of you and your group

○ San Mateo County Central Office

- ✓ Tele-Service
- ✓ Central Office Delegate
- ✓ Central Office Operations Support

✓ AA General Service (US / World-wide)

- General Service Representative (G.S.R.)
- NorCal Intragroup
 - ✓ Bridging the Gap
 - ✓ PI/CPC (Professional Information/Cooperation with the Professional Community)

✓ Hospitals & Institutions (H & I)

San Mateo Central Office – Where in the world is it?...



Location

San Mateo Fellowship of Alcoholics Anonymous
2215 S. El Camino Real, Suite # 204 (2nd floor)
San Mateo, CA
94403

Website: **AA-SAN-MATEO.ORG** ← DO EXPLORE!!

What they do.....

- Your primary AA resource and support service center for AA in San Mateo County
- Your primary source for AA approved literature...Books, Pamphlets, etc.
- Publishes the San Mateo “High Sobriety” monthly AA newsletter
- Sponsors San Mateo county’s AA TeleServices
- Publishes the San Mateo AA Meeting Directory;
- sources the meeting data needed for the “Meeting Guide” smart phone App.
- Now a source for chips!
- and more

See the “What does Central Office do?” flyer for a more complete list!

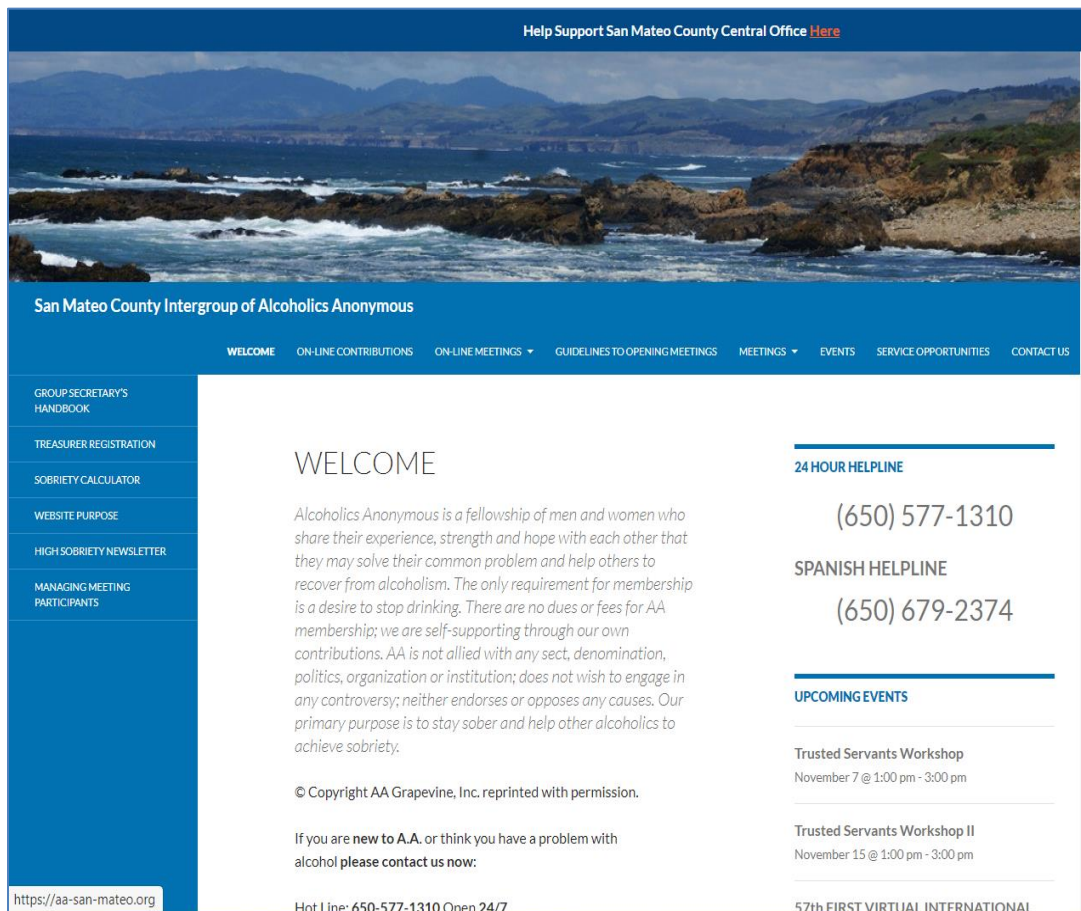
The San Mateo County AA Web Site

— aa-san-mateo.org —

The San Mateo County Intergroup of Alcoholics Anonymous web-site is an indispensable resource

On Central Office's web-site you will find:

- Latest “on-line” and “live” AA meeting schedules in San Mateo County
- Latest AA news including upcoming AA Meetings and Events
- Links to AA 24-Hour “Helplines”
- Group Secretary’s Handbook and other resources
- Large set of group resources including links to available “on-line” literature
- Current **High Sobriety** Newsletter and a complete archive of past ones
- Links for on-line 7th Tradition contributions Central Office, H&I and GSO ...
- and much, much more



.... “*What does Central Office do?*”

Sponsors TeleServices for San Mateo County

... We are responsible...when anyone, anywhere reaches out for help, we want the hand of AA always to be there...

- ✓ TeleServices volunteers answer the San Mateo Central Office phones whenever the office is closed, assuring that there is always a person there to help ...
- ✓ TeleServices for many alcoholics is their critical first contact with AA
- ✓ How this service works...
 - ✓ **Front-Line** volunteers answer all incoming calls in real time...
 - ✓ **Backline** volunteers help if the caller is seeking help other than basic information (i.e., meeting information) such as conversations about how the program works or arraigning a 12th step intervention. This is usually done as a follow-up call back to the caller.

Volunteer requirements

- ✓ 1 year of sobriety
- ✓ Available for the 1 year commitment
- ✓ Shifts are assigned in either 4- or 8-hour periods, usually 1/month
- ✓ Working, reliable telephone connection

... and more ... “What Does Central Office do?”

ZOOM Support for AA Groups in San Mateo

**San Mateo Central Office has established the
ZOOM Accounts & Infrastructure
needed to support AA Groups
wanting to setup & run their
AA Meetings on-line!**

Please contact Don C. at Central Office if your group wants to explore the possibility of using central office's ZOOM resources for your group's ZOOM meetings needs via Central Office's ZOOM account.

Don C.
Central Office Manager
San Mateo AA Central Office
Phone: 650-577-1310

General Service Structure

What is General Service?

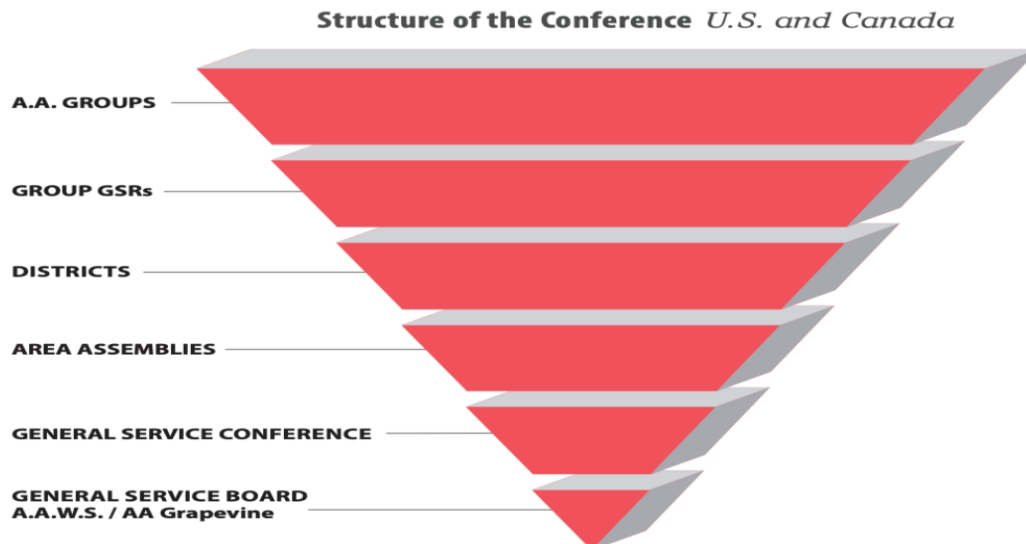
A.A.'s success as a fellowship is due to both:

- **Success of the individual/group's programs of recovery, and**
- **Continued world-wide support of AA's General Services.**

❖ **Groups carry the message *locally*, but someone must be responsible for carrying the message more broadly!**

- ✓ In the early years, Bill and Dr. Bob did this themselves – but, they didn't know who would take over for them. Then ...
 - Bill came up with a solution for the leadership of A.A. to be succeeded by the *collective conscience of the groups* in A.A. and came up with a “service structure” to facilitate Twelfth Step Work across the country and around the world: *The General Service Conference*.

The General Service Conference structure ensures that A.A. groups have a voice in the affairs of the AA Fellowship.



- ✓ Within the General Service Conference structure, the collective conscience of our Fellowship (i.e., the group) have ultimate authority.

More information found in: [G.S.R. General Service Representative \(P-19\)](#) pamphlet, and [The A.A. Service Manual \(BM-31\)](#)

A General Service Representative (G.S.R.)

What does the General Service Conference do?

Carry the message of recovery (Twelfth step work). Some examples include:

- ✓ Sharing information about the A.A. program with professionals and people who have contact with alcoholics
- ✓ Support A.A. members in carrying the message to alcoholics in jails and prisons
- ✓ Develop and review literature, including development and circulation of Grapevine and La Viña
- ✓ Create greater understanding – and prevent misunderstandings of – the A.A. program through media

What do G.S.R.s do?

- ✓ They link their home group with the whole of A.A. They transmit ideas and opinions, as well as facts. Through the G.S.R., the group conscience becomes a part of “the collective conscience of our whole Fellowship” as expressed in the General Service Conference.
- ✓ Attend *monthly* San Mateo general service **district** meetings. The district is one part of a general service **area**.
At district meetings, GSRs receive information about what is going on in the district, in the area, and the entire Fellowship. GSRs also carry their group’s conscience and vote on any district business.
- ✓ Attend *quarterly* **area assemblies**.
Here, GSRs receive information about what is going on in the area and Fellowship. They also carry their group’s conscience and vote on area business.
- ✓ Serve as the group contact for the district, area, and the General Service Office (GSO), and transmit information they receive to their groups to keep them informed and allow them to participate in the General Service Conference.

Learn! There’s a lot to learn, but there are many helpful people in service willing to teach GSRs if they ask!

Role of a GSR

What are the duties of a GSR?

- ✓ Attend and participate in monthly *district* meetings on the 3rd Tuesday of each month @ 7:00pm – currently virtual on Zoom – and other district events (e.g., Unity Day); take notes and report back to your group on information shared
- ✓ Attend and participate in quarterly *area* meetings in April, May, August, and November (location varies throughout the area); take notes and report back to your group on information shared
- ✓ Serve as mail contact with GSO and receive mailings from GSO; keep your group informed of AA activities worldwide
- ✓ Serve as mail contact for the district and area, receiving emails and mailings
- ✓ Learn about the Twelve Traditions and Twelve Concepts
- ✓ Share and/or vote on behalf of your group during district and area meetings by collecting informed group consciences through group sharing sessions
- ✓ Keep informed of your group's problems, concerns, and interests

What does it take to be a good GSR?

Suggested criteria...

- ✓ 2 years continuous sobriety
- ✓ Active membership and participation in your group (i.e., attend regularly), with no other positions in your group
- ✓ Prior service commitment history
- ✓ Knowledge of the 12 traditions, patience, and ability “to place principles before personalities”
- ✓ Availability to serve as GSR for two years
- ✓ Having or obtaining a service sponsor once elected. Experience has shown that successful GSRs have a service sponsor

How to become a GSR?

- ✓ If your group has a GSR, talk to them to learn more about the commitment and make yourself available at the next election.
- ✓ If your group does not have a GSR, announce what you learned today at your group and suggest having an election – then make yourself available.

Group SECRETARY Trusted Servant Position

– GENERAL –

Suggested Requirements

- Suggested minimum length of sobriety requirement of 6 months.
- Able to attend all meetings for the term of office.
- Suggested length of service commitment for a meeting Secretary is six months (for co-secretaries, it's often for one year).

Remember that

- ❖ Rotation is one of the more important principles in the structure and operation of a local group (and, indeed, throughout the AA fellowship).
 - If your successor is a first-time secretary, make yourself available for the first few meetings of their term, and give them your phone number!

Note:

The group Treasurer is usually the primary contact with Central Office.

But, if you are the primary Central Office contact for **your** group, please register with the San Mateo Central Office.

- Registering with the Central Office will allow mailings to be sent to the correct person in your group: includes the monthly High Sobriety newsletter published by Central Office.

Suggested Readings/Resources

- AA Pamphlet: P-16 The AA Group ... Where it all begins
- AA Pamphlet: P-17 AA Tradition – How it Developed
- AA Pamphlet: F-96 Memo to An AA Treasurer
- Secretary/Treasurers Handbook: available at Central Office and is available to download from Central Office's Web site
- Safety Card For A.A. Groups

Meeting SECRETARY – Before the Meeting Starts

- Arrive early at the meeting place to insure it is properly "set up".
For some meetings, the actual setup work may be delegated to the coffee maker or another person as a service task.
- Obtain your speaker *in advance* for Speaker/Discussion meetings. Speakers should be advised in advance of the type and length of the meeting and AA's primary purpose.
- Before the meeting starts, select members to read *How it Works*, *Traditions* and/or other group approved readings.
- Have refreshments, if any, prepared and available before the meeting starts.
- Have books and literature available and on display.
For some Groups, AA literature management has been made a Trusted Servant position – The Literature Person.
- *Start* and *close* all meetings ***on time!***
- Many groups have “informal” service commitments to help with running meetings:
 - *Coffee makers*
 - *Set-up / close-up (chairs, group lit, room cleanup)*
 - *Zoom “co-hosts”*
 - *Meeting Greeters*
 - *Meeting Treats or Cookie provision (...often a week at a time commitment...)*
 - *.... and any other contributing task that works for a group*

Meeting SECRETARY – During the Meeting

- ✓ Run the meeting, usually following a fixed script
- ✓ Make AA related announcements
- ✓ See that collection baskets (7th tradition and H&I) are passed around the room and returned to the Treasurer (or Secretary)
- ✓ As Meeting Secretary, you should refrain from interrupting the discussion to interject your own thoughts.
- ✓ As Meeting Secretary, you should seldom participate in the meeting's discussion unless the group is small & time is plentiful.
- ✓ Meeting Secretary is responsible for maintaining orderly conduct of the meeting, intervening if, and when necessary....

Hint – Lead by example!

Should a disturbance arise during the meeting, the secretary should perhaps stand and say something like ... "Pardon me, but I think we should continue with the general discussion. Perhaps we can discuss this after the meeting."

ALSO, from time-to-time

- Periodically lead the group's "Business" related discussions
[typically monthly following the regular meeting or as needed]
 - *Request reports from Treasurer, Central Office Delegate, GSR, H&I, and other representatives on a regular (usually monthly) basis.*
 - *Facilitate group business matters (oversee elections, group consciences, etc.) as needed.*

Meeting SECRETARY – After the Meeting

- After the meeting has ended, make sure that:
 - ✓ Room is left neat and clean
 - ✓ Dishes are cleaned and put away
 - ✓ Coffee pot and other appliances are unplugged, stored
 - ✓ AA material stored when appropriate

- Turn off lights and lock the doors as you leave.

- Anything else that is expected by your landlord and/or needed to maintain good relations with them.

Segue: Integrating “ZOOM” into AA Meetings

Best Practices – *Tried and True!*

- Strongly recommended that the Zoom Host use a computer (PC, Laptop or Mac), or at least a “Tablet” if hosting small meetings.
- Use “Waiting Rooms” for ZOOM meeting security, not passcodes!
- Assign *one or more* “co-Hosts” to perform Zoom related tasks such as:
 - ✓ “Waiting Room” management, and
 - ✓ Most other ZOOM app. tasks (e.g., document sharing, “raised hand” management, etc.) during the meeting

The Meeting Secretary

The job of the Secretary is very much the same on ZOOM meetings as it is for in-person meetings. But,

As Meeting Secretary, do not try doing the Zoom hosting tasks all by yourself during the meeting!

The ZOOM Host and Co-Host(s)

- Each ZOOM meeting needs to be started by the ZOOM “Host”!
- The Host needs to have a reliable computer and stable internet connection.
- Zoom hosting experience *is required*; practice is the best teacher!
- Don’t act *stupidly*: If you are the meeting Secretary, assign co-hosts to manage the ZOOM tasks before you start your meeting!

Meeting SECRETARY Responsibilities

– Differences @ Larger Fellowships –

- Some Fellowships are large organizations that hosts many weekly group meetings at their facility.
For example:
 - *San Carlos Peninsula Fellowship (Eaton): 40+ meetings/wk.*
 - *West Bay Fellowship (WBAC): 20+ meeting/wk.*

- Larger Fellowships may have organizing committees and service positions that support all meetings held at the fellowship, such as:
 - *A Steering Committee*
 - *A Fellowship Treasurer*
 - *A Fellowship Literature Person*
 - *A Fellowship supplies “Buyer”*
 - *A Meeting Secretary Coordinator*

- Larger Fellowships often have specific “requirements” and “responsibilities” unique to their fellowship.
For example:
 - *Specific sobriety requirements for the Meeting Secretaries*
 - *One Treasurer for entire fellowship*
 - *One Literature person for entire fellowship*
 - *Different before-after meeting procedures for meeting secretaries*
 - *Fellowship Cleaning & Maintenance person*

GROUP FINANCIAL RESPONSIBILITIES

*“Each group ought to be fully self-supporting,
declining outside contributions”*

– 7th Tradition

***It is the primary responsibility of the treasurer to
carry out the tasks needed to manage
a group’s financial affairs.***

- It is strongly suggested that each group have a treasurer.
 - *If your group does not have a treasurer, then this is an important part of your job as group secretary.*

- Suggested requirements for the Treasurer Trusted Servant position are:
 - Suggested length of service is 2 years.
 - Suggested length of sobriety is a minimum of 2 years
 - Demonstrated money handling acuity.

- The group Treasurer is usually the primary contact with SM Central Office.
 - If you, as the treasurer, are the primary Central Office contact, please register with the Central Office.
 - Registering with the Central Office will allow mailings to be sent to the correct person, including the monthly *High Sobriety* newsletter published by Central Office.

TREASURER – RESPONSIBILITIES

- Keep a simple *but formal* (e.g. written) record of funds received, group expenses and disbursements of monies.
 - This serves as a record to assist your memory and is a point of pride w.r.t. how you are performing your duties as treasurer

- Prepare and present a monthly report to the group!

A useful example of a Treasurers report form is available at Central Office

The report should account for:

- 7th Tradition contributions collected
- Other funds received (e.g., books purchases)
- Group expenses (rent, supplies, literature, etc.)
- 7th tradition group contributions made to Central Office, GSO in NY, Area and Region AA Groups.
- Cash on hand and group's current "prudent reserves"
- Amount of H & I contributions collected and sent to H & I

Note Well!

**H & I contributions collected at AA meetings are not
7th tradition contributions for your group's use!**

*Best accounted for separately and forwarded directly to H&I
on a periodic (monthly) basis!*

TREASURER – More on Managing Expenses

Rent and bills need to be paid, expenses reimbursed, and prudent reserves maintained.

Suggestion: Ask your previous treasurer or your group's steering committee for how this has been done in the past!

➤ **First order of business is to pay your group's bills, then manage your cash reserve:**

First: Cover your group's monthly expenses

Each A.A. group is self-supporting. This means you pay for:

- Rent, utilities, and other bills
- Coffee and the refreshments (if any)
- AA Books and literature.
- other expenses of the group (i.e., coffee pots, A.A. wall-hanging signs, A.A. books, Zoom, etc.)

Second: Build and protect a “prudent reserve”

- Suggested prudent reserve of 3-month expenses
- Usually built up over a number of months to your established prudent reserve goal.

TREASURER—Supporting the AA Organization

After
**your group's bills have been paid and
your prudent reserve has been fed,**

remaining 7th Tradition funds
**are usually distributed to support
national, regional and local AA service groups.**

➤ **SM Central Office suggests the following distribution scheme
for contributing a group's excess 7th tradition funds:**

<u>AA Service Group</u>	<u>%</u>
○ San Mateo Central Office	60%
○ General Services in NY	30%
○ Area AA group	5%
○ District AA Group	5%

TREASURER – Supported AA Organization Addresses

**Central Office
(60%)**

To our “Central Office”

San Mateo Central Office
2215 S. El Camino Real, Suite 204
San Mateo, CA 94403

Make check payable to: **San Mateo County Fellowship**

**General
Services,
NY
(30%)**

To the General Service Office in New York city

General Service Office
P.O. Box 2407
James A Farley Station
New York NY 10116-2407

Make check payable to: **General Fund**

**Area
(5%)**

To Your Area Committee: Your contribution supports Area Assemblies, Delegate's expenses, Public Information and Community and Institutions work.

California Northern Coastal Area
1390 N. McDowell Blvd.,
Suite G 339
Petaluma, CA 94954

Make check payable to: **CNCA06**

**District
(5%)**

To your District: Your contribution supports District communication with groups, providing group conscience at an assembly level and serving as a link between Area delegates and GSR's.

District 5 - San Mateo County
P.O. Box 6332
San Mateo, CA 94403

Make check payable to: **AA District of San Mateo**

Treasurer – H & I Contributions

Remember!

***H&I collected donations are separate from
the group's 7th tradition contributions!***

***“Pink Can” contributions
are sent directly to H&I!***

Send H & I contributions to:

H&I
P.O. Box 192490
San Francisco, CA 94119-2490
Make checks payable to: **NorCal H & I**

Never send cash in the mail!

“ZOOM” Meetings Affects How We Practice the 7th Tradition

Key Disruptions

- How we “Pass the Basket” for 7th Tradition Contributions
- How we pass the “Pink Can” for H & I Contributions
- ZOOM only Groups have few physical meeting expenses, i.e., coffee, snacks...
- ZOOM only Groups may have no “rent” expenses ...
- ZOOM only Groups have smaller “Literature” expenses
- ZOOM only and Hybrid-ZOOM groups need different tools to effectively “Pass the Basket” to ZOOM attending participants.

What is the same

- Does have Group expenses (e.g., email & Zoom Account costs) to be managed.
- Will have “other” Group expenses (ZOOM, Mail, literature, etc.)

Key questions to ask going forward

- ✓ *What monthly expenses will we continue to have?*
- ✓ *What will we need on a monthly basis to stay “self-sufficient?” (7th Tradition)*
- ✓ *What is our “Prudent Reserve”?*
- ✓ *How do ZOOM attending members make 7th tradition contributions?
... mail? Group’s Web site Internet based tools?*

EMERGANT On-line Donation Tools

Central Office on-line 7th Tradition & H&I Donation tools

- Central Office Web Site based 7th Tradition donation link (for Groups and Individuals)
Note: On-line contributions go directly to central office, not your local group

H&I donation link: <http://www.handinorcal.org/contribute>

On-line tools used by AA Groups to collect 7th Tradition donations

- Use of Venmo & PayPal tolls for 7th tradition donations
- Some groups have used “GoFundMe” site for 7th Tradition donations to the Group

AA LITERATURE – General

- Developed to be a resource for the recovering alcoholic and for anyone who wants to find out about Alcoholics Anonymous. Types of AA Literature include:
 - AA Approved Books – “Big Book”, Daily reflections, The “12 by 12”, etc.
 - AA Approved Pamphlets – “Is AA for me?”, “AA for the Woman”, etc.
 - The Grapevine and other booklets
 - New Members packets, Meeting Directory, Phone list, etc.

- A.A. World Services was established to maintain the principles developed by the founders and to keep them pure, unadulterated and relevant.
 - Most of the “approved” AA literature is published and distributed by the General Services Org. in New York City.
 - Establishes who is responsible for creating and distributing approved literature, how things are changed and added to A.A. literature.

- AA literature also:
 - Explains how other problems and addictions fit into the AA framework.
 - Describes the history of A.A. and the early work of the founders.
 - Defines the support structure of A.A. that allows A.A. to reach out all over the world through SERVICE.

Note:

Central Office is a primary local AA source for “Conference Approved” AA literature.

AA LITURATURE – More on its Prime Purpose

AA Literature is needed to help us fulfill our primary purpose.

Each type of the available literature is important to us at different times in our sobriety depending on our needs at that phase in our recovery:

For the Newcomer:

- Explains what A.A. is, what A.A. is not, what to expect in meetings, how much it costs, how long before you graduate, etc.
- Can help dispel some of the fear we all have when encountering the unknown.

For the new member of A.A.:

- Explains the process of Recovery: how the “Big Book” and the “12 X 12” support AA’s program for recovery.
- Other literature gives A.A. members guidance in helping the newcomers.
- Defines the requirements for UNITY. The 12 X 12 and other literature define the 12 traditions which define, in part, the principles of unity and what is necessary to maintain it.
- Explains the workings of the A.A. meeting, how they work,
- Tells what a sponsor is.

THE LITERATURE PERSON'S JOB

- Establish your group's literature requirements, take inventory and manage your group's stock of literature:
 - ✓ When first elected, do an inventory of the literature on hand.
 - ✓ If there are no written guidelines for selecting/maintaining literature stock, bring this up with the group to establish an "available literature" list for the group.
 - ✓ Don't forget to add the newcomer's packet and the Meeting Directory listing for San Mateo that is available from Central Office!
- Once the desired literature list is established, the literature person is responsible for seeing that the available literature remains close to this agreed upon list.
- Literature person sets up the literature well before the meeting starts and stores the literature at the end of the meeting.
- Literature Person collects payments for purchased literature and turns of payments to meeting treasurer.
- The literature person makes sure the literature remains well stocked; central office is a good source for needed literature and chips
 - *N.B. Remember to turn in the receipt to your group treasurer for reimbursement.*

Suggested resources from Central Office

- AA Pamphlet: AA Literature
- Available AA literature Price list (from Central Office)

AA LITERATURE – The Needy Newcomer

- **The Big Book – No newcomer should leave without a Big Book because of lack of finances.**
 - ✓ It is the custom of most groups to give a Big Book to a needy newcomer who can't easily pay for the book themselves.
 - ✓ In the interest of promoting personal responsibility, the purchase can be paid for by the newcomer in several smaller sized partial payments.

- **The Newcomer's Packets – Useful newcomer information**

Newcomer's Packets are available (at cost) from Central Office

 - ✓ Meeting Schedules
 - ✓ Useful AA Pamphlets
 - ✓ Contact Lists

Appendices

- **Running on-line AA Meetings on ZOOM – The Basics**
- **Zoom Account Setup for on-line Meetings**
- **Best Practices for Virtual Meetings on ZOOM – An example**
- **ZOOM Host & Co-Host Controls**

Running ZOOM AA Meetings

– Example: Using a preconfigured Central Office Zoom ID –

Key Recommendations for anyone “hosting” a ZOOM meeting

- ✓ Use a Mac, PC, or laptop when hosting ZOOM Meeting – no smartphones!
- ✓ The secretary is **strongly encouraged** to assign a “co-host” to help manage ZOOM

Basic steps to start and run on-line ZOOM meeting:

1. Host starts Zoom meeting ~15 minutes prior to start of meeting by:
 - a. Starts ZOOM app and “signs in” with the assigned username and password, or Opens the ZOOM Web page (www.us02web.zoom.us), chooses the “Sign in” page and then enters the assigned user name & Password to sign-in;
 - b. Host then chooses their specific meeting to start from the scheduled meeting list and then presses its meeting “start” button.
2. Host now opens the Participants panel by tapping the “Participants” control. Then...
 - a. Host “Admits” new participants as they enter the waiting room;
 - b. Host assigns at least one “Co-Host” to help manage ZOOM tasks;

Note: Key Zoom participant capability choices available to Host to set are:

- Allows participants to “share” with all participants electronic versions of commonly used AA materials (or only allows the Host/Co-Host to share)
- Allows participants to post notes, resources & other information via “Chat”
- Can “Mute” all participants to help keep meeting’s audio comfortable for all!

3. **The Meeting secretary now conducts the meeting’s activities as usual.**
 - The Co-Hosts may “share” any documents with participants, as appropriate

4. At end of meeting, the ZOOM Host ends the ZOOM meeting and “Signs-out”
 - Host may make another participant the “Host” to allow continued discussions.
 - Host now “ENDS” the ZOOM meeting and “Signs-out” of the ZOOM App.!

NOTE: The specific device that the HOST is using to Log into ZOOM **must** be validated as a registered device **prior** to starting the ZOOM session! Call Don C. at Central Office to help validate your device prior to initiating your first meeting! Central Office is open Monday through Friday from 8:30 to 4:30

Managing Meeting Dynamics & Security Controls

The Host (& co-hosts) can control the meeting’s participants and the meeting’s environment either from the participant’s panel or by clicking on the three dots in upper right-hand corner of anyone’s video square to:

- Turn off a participant’s video & Mute any/all participants.
- Send unruly participants back to the Waiting Room or Remove them from meeting.

Zoom Account Setup for on-line Meetings

This workflow sets up and configures a ZOOM account sufficient to support typical, 1-1½ hour AA meetings. The account setup has the following characteristics:

- Creates a ZOOM account capable of supporting standard AA meetings with less than 1,000 attendees and meeting lengths greater than 40 min. (e.g., a “Pro” ZOOM account costing ~\$15/mo.)
- Utilizes ZOOM’s “Waiting Room” Security setting and turns off ZOOM’s meeting passcode
All attendees will need to be individually “admitted” by either the ZOOM “host” or assigned “co-host”.

Workflow

1. Create e-mail account with an email provider [e.g., myAAGroupName@gmail.com]
2. Set up a new ZOOM account
3. Configuring your basic ZOOM meetings Settings

1. Create a Group e-mail Account

This e-mail account will be the owner, manager and payee for all ZOOM account business

- a. Go to a email service provider of your choice and create a mail account
(for this example we will use Google as the service provider and user name as: myAAGroupName@gmail.com)
- b. Keep this name and its password private and only give control of it to Meeting Secretaries and other “trusted servants” of your AA group.

2. Set up a new ZOOM Account

- a. Sign into www.zoom.com
- b. Using your group’s email address, create a “**Pro**” ZOOM Account
Note: Pro level of account Cost: ~ \$15/mo. or ~ \$150/yr.
- c. Once the ZOOM account is created, sign-in and go to Profile & Settings to set your name and meeting info to reflect your group’s tastes.
- d. Go to Settings and make the following configuration changes for all meetings:
(other changes may also be wanted/warranted):
 - i. Waiting Room ON
 - ii. Meeting Passcode OFF
 - iii. Personal Meeting Passcode OFF
 - iv. Enable Personal Meeting ID ON
 - v. Use Personal Meeting ID when starting a Meeting ON
 - vi. Use Personal Meeting ID when scheduling a Meeting ON
 - vii. Chat ON
 - viii. Private Chat ON
 - ix. Sound notification when someone joins ON
- e. **TEST YOUR CONFIGURATION**
When complete, go back to main ZOOM screen and test your configuration by:
 - i. Start a New meeting by clicking on “New Meeting” icon
 - ii. Have someone sign into your meeting using your Personal ID number
 - iii. Click on Participants Menu icon at bottom of the ZOOM meeting screen
 - iv. When the new attendee enters the Waiting Room, let him/her “Join” meeting.

Zoom setup is complete and you can Start using it to have your meetings.

BEST PRACTICES FOR VIRTUAL MEETINGS ON ZOOM

– One Example –

THE BASICS

- The Host and Secretary should be two different people. Each job is separate.
- The Host should be using a computer (PC, Mac, or laptop), or at the very least, a tablet if you are hosting a small meeting. You should not attempt to host a meeting from a smart phone.
- The Zoom App should be used for hosting virtual meetings on Zoom. Do not use the browser.
- Check for Zoom App updates periodically by launching the app, clicking ZOOM.US, then click CHECK FOR UPDATES. The app should do this automatically, but it doesn't always.
- Hosts and Co-Hosts should be set commitments. It is best to have a cohesive group as opposed to new people each meeting.
- It is recommended to have at least one Host and one Co-Host (2 Co-Hosts for larger meetings).

THE MEETING SECRETARY

- The job of the Secretary is the same on a virtual meeting as it is in an in-person meeting. While the Secretary may be made a co-host to have access to hosting controls, they should not have to worry about hosting duties.

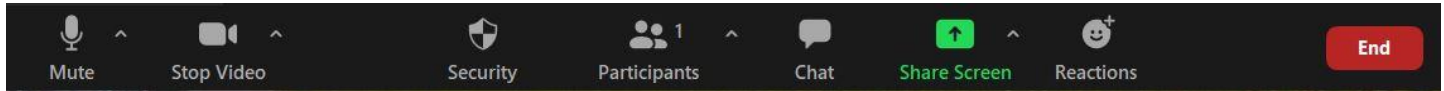
THE HOST

- Each group should have a dedicated Host. This person is also the contact person between the group and Central Office.
- It is strongly suggested this person have a computer and consistently stable internet connection.
- We suggest the Host be a 2-year commitment.
- It is also suggested that this person have ample sobriety time that they are familiar with people in the meeting and who might be someone to keep an eye on.

CO-HOSTS

- In addition to the Host, it is suggested there be at least one Co-Host. If your group is small, say under 10 people, or private, just the Host may be adequate. If your group is large and open, it may be helpful to have 2 Co-Hosts.
- The Co-Host is there to help support the Host. This should also be a dedicated commitment.

HOST AND CO-HOST CONTROL Choices



- **SECURITY:** Controls functions for the meeting and what participants can or cannot do.
 - **LOCK MEETING:** This will prohibit any new participants from entering the meeting. This feature is generally not used unless there has been a Zoombombing.
 - **ENABLE WAITING ROOM:** The Waiting Room will automatically be enabled by Zoom if there is no password for the meeting as a security feature. It cannot be disabled.
 - **ALLOW PARTICIPANTS TO:**
 - **SHARE SCREEN:** This feature should not be checked. Allowing participants to share screen is an invitation for Zoombombing. The Host should be the only one allowed to share a screen, such as for readings.
 - **CHAT:** This feature is up to the group. Checking this feature allows participants to send personal messages to each other or messages to the entire group. If Chat is not checked, participants can only send messages to the Host or CoHosts. Hosts and Co-Hosts may send messages to everyone, the Waiting Room, or individuals regardless of whether this is checked. This feature may be changed during the meeting – for instance, a group may choose to disable chat while a speaker is sharing to limit distractions.
 - **RENAME THEMSELVES:** This feature is also up to the group. Some feel that this could allow potential Zoombombers to display offensive messages. On, the positive side, it allows participants to display their name if they are using someone else’s device or wishes to remove their last name.
 - **UNMUTE THEMSELVES:** This feature is up to the group and can be changed throughout the meeting. Some groups may choose, for instance, to allow unmuting before and after the meeting, but not allow it during the meeting as a way to control Zoombombing and people speaking at once. If you disable this feature, the Host or Co-Host will need to unmute participants when they wish to speak.

- **PARTICIPANTS:** While all meeting participants have access to the Participants screen, Hosts and Co-Hosts have some additional features:
 - **MUTE ALL:** This button allows the Host to mute all participants at once. You will be prompted whether to allow participants to unmute themselves. This button is helpful at the start of a meeting or if there is a Zoombombing.
 - **••• BUTTON:** Clicking the **•••** button brings up a menu of options:
 - **ASK ALL TO UNMUTE:** This is useful at the end of a meeting or at any time you would like all participants to unmute.
 - **MUTE PARTICIPANTS UPON ENTRY:** This may be useful once a meeting has begun so that any new participants are muted. You are given the same choice of allowing them to unmute as you are given under “mute all”.
 - **ALLOW PARTICIPANTS TO UNMUTE THEMSELVES:** This is another place to designate whether or not participants can unmute themselves.
 - **ALLOW PARTICIPANTS TO RENAME THEMSELVES:** This is another place, in addition to Security, to designate whether participants can rename themselves.
 - **PLAY SOUND WHEN SOMEONE JOINS OR LEAVES:** This feature will play a doorbell-like chime whenever a participant enters or leaves the meeting. Most people find this incredibly annoying. It is recommended to leave unchecked.
 - **ENABLE WAITING ROOM:** This option cannot be disabled.

- **LOCK MEETING:** This is another place, in addition to Security, where the meeting can be locked to prevent anyone from joining.
- **CHAT:** All participants have access to the Chat window; however, the Host & Co-Host have additional features:
 - ○ **BUTTON:** Clicking the ◦◦◦ button brings up a menu of options:
 - **PARTICIPANTS CAN CHAT WITH:** Here you can customize who participants can chat with. Options are: No one, Host Only, Everyone Publicly, Everyone Publicly & Privately. This can be changed during the meeting as appropriate.
 - **SHARE SCREEN:** Here the Host can share their screen with the group. This can be useful for readings. You must have the screen you wish to share already open on your computer for it to appear in the Share Screen window. Select the window you wish to share and click “share”.


When you wish to stop sharing, click the red “stop share” box at the top of the screen. Participants will not be able to share their screens.

HOST & CO-HOST DUTIES

- The Host is responsible for opening the meeting 15 to 30 minutes before the meeting start time. (No earlier than 30 minutes prior).
- Once the Co-Hosts have entered the meeting, the Host must designate them as Co-Hosts by clicking the ◦◦◦ button either next to their name in the Participants screen or in the upper right corner of their Zoom square and selecting “Make Co-Host”.
- It is suggested to assign certain tasks to the Host and Co-Host(s) ahead of time to make moderating the meeting run smoothly. These tasks may consist of:
 - **WAITING ROOM:** One person should monitor the Waiting Room and admit participants. If you are unsure or suspicious of someone in the Waiting Room, you can send them a chat message to turn on their video when they enter so you can identify them. (Note: they will not be able to chat back to you).
 - **MUTING AND UNMUTING:** One person should be responsible for muting and unmuting participants during the meeting. This may be as simple as muting all when the meeting starts or consist of muting all without enabling participants to unmute themselves, then unmuting participants when it is their turn to speak. In the event of a Zoombombing, the Muter should immediately Mute All and disable allowing participants to unmute themselves.
 - **SECURITY:** At least one person should be responsible for scanning the group for suspicious activity. One way to make this easier in a large group that fills multiple screens is to click on and drag any unknown squares to the first screen where you can keep a closer eye on them. This might include unfamiliar names, suspicious names, participants with no video, unrecognized dial-ins, etc. In the event of a Zoombombing, this person will be responsible for removing any Zoombombers and locking the meeting. Security cannot be effectively done on a tablet.
 - **SCREEN SHARING** (if applicable): If the group chooses to display readings (these may include: How it Works, The 12 Traditions, The Promises, Book/Grapevine readings for the meeting, etc.). Remember, these should be open on your device and ready to go before you begin sharing your screen.

IN THE EVENT OF A ZOOMBOMBING

- Zoombombing can take place in the form of visuals, audio, or offensive messages to the group or individuals in the Chat.

- Once a Zoombombing is detected:
 - The Muter should immediately Mute All and not allow participants to unmute. (Use the Participants Window as this is the most direct way)
 - The Host should make an announcement, such as: “We are being Zoombombed. Please remain calm and quiet as we remove the Zoombomber and secure the meeting.”
 - The Security person should identify and **REMOVE** the zoombomber from the meeting using the  button either next to their name in the Participants window or in the upper right-hand corner of their thumbnail. Note: Be careful who you REMOVE from a meeting as they will not be allowed to reenter the meeting for that meeting’s duration. If you are unsure, you can MOVE them to the Waiting Room until you are certain you have the correct person.
 - The Security person at this point may opt to **LOCK** the meeting to prevent anyone else from entering.
 - The Host should announce, “The meeting is secure and may continue. Thank you for your patience.”