Leading Mission u Studies on Zoom: A General Guide

Purpose: To provide study leaders with helpful tips and practical guidance when leading a Mission u study online.
Welcome.

If you have found your way to this guide, it means you are about to lead one of our Mission u curricula online! And we are so glad that you are taking this next step to preparing yourself to lead this well. Whether or not you use a few of these features or all of them, feel no pressure to be an online master overnight. Virtual tools are just access points. You, the leader or facilitator, are the compassionate guide. No technology, no matter how fancy or polished, replaces the genuine and authentic way you will guide and nudge others towards transformation. So, if you feel like any of the features are distracting you from being present, ask yourself, what then is the least amount of technology or structure needed to fulfill the goals of this study or activity?

We hope this guide will assist you in creating a virtual environment that supports learning, critical reflection, spiritual discernment, dialogue and community building. After all, our studies and curricula are written for a community to learn together.

If you need a tutorial or manual with step-by-step instructions, we will include links to tutorial videos and articles that contain more detailed instructions. While a variety of videoconference platforms exist, this guide is set up for a leader to use Zoom's platform.
Overview

Section I is a brief overview of a few main features in a Zoom meeting. You don’t have to utilize them all, but practicing these functions can support just about any study or group you lead: (A) Setting Up Your Zoom Meeting; (B) Role of Host and Co-Hosts: Best Practices; (C) Videoconference View Options; (D) How to Share Content: Slides, Videos, Music #Screenshare; (E) Chat Function; and (F) Breakout Rooms or Breakout Groups.

Section II discusses additional Zoom features, annotations and polls, if you want your participants to engage in them. These tools can enhance participation, but are not necessary.

Section III is all about creating and sustaining a learning community. In the same way we set up a class or learning space, how do we set up Zoom for learning to happen in community? How do we accommodate different learning styles? How do we add beauty, creativity, art and music and make meaning of what we’re learning when we’re not physically together? How do we ensure that those who are challenged by technology or spotty internet service are supported?

Appendix: Here we provide a Study Session Planner—a chart that might prove helpful when you’re planning and designing your session(s) on Zoom.

This guide is just a starting point. There is so much more that could be included and updated, which is why this will remain a live document. We hope to update it as we learn, grow and adapt to leading Mission u curricula online.
I. Basic Features on Zoom that Support Learning Together

A. Setting Up Your Zoom Meeting

1. **Read:** “How to Host a Simple, Live Virtual Event Using Zoom,” unitedmethodistwomen.org/Media/PDF/HowToHostVirtualEvent.pdf

2. **Watch** this United Methodist Communications video (45 minutes): “Getting Started with Zoom for Worship and Small Groups,” youtube.com/watch?v=a2FZD1d_yFQ

B. Role of Host and Co-Hosts: Best Practices

1. Hosts on Zoom are the only ones responsible for starting and ending the meeting and moving or assigning participants into breakout rooms. But a host also does so much more than these technological functions. A host is also responsible for creating a hospitable and welcoming space for participants to find their way, to feel comfortable, and to open up to the possibility that new learning and experiences can and will happen. For more on your role as study leader and host, see the section titled Crafting a Hospitable and Welcome Space (Section III, A).

2. We encourage that whenever you lead a study online, to not do it alone. Invite a co-host to help you manage the Zoom space, chat box, waiting room and participants. You can only assign a co-host on Zoom once the meeting has started. Having a co-host who manages the technology and administrative aspects of the study will alleviate the burden of simultaneously trying to lead a study thoughtfully, while also
managing the technology. Having a co-host will allow you to be even more present to your participants. You also have the option as the host to transfer host controls to someone else, if you prefer not to manage breakouts, polls and other Zoom features.

3. For a brief overview and demonstration of the host and co-host(s) function and controls, please see this 10-minute video tutorial: support.zoom.us/hc/en-us/articles/201362603-Host-and-co-host-controls-in-a-meeting

C. Videoconference View Options

In Zoom there are various options for viewing yourself and other participants. It would be helpful to familiarize yourself with these options so you can guide participants should they need to change their video layout depending on the activity you are leading.

1. **Active Speaker View:** Allows whomever is speaking to be the largest video displayed on screen. This view is helpful if there is just one speaker at a time and all other participants are muted. (It’s not as helpful if multiple people are unmuted.) Active speaker view is typically the default setting for all users, regardless if you are on a laptop, tablet or smartphone.

2. **Gallery View:** By default, Zoom allows you to see up to 25 participants per screen or up to 49 if you change the number in your meeting settings. When engaging in group discussions we encourage you to invite participants to select their gallery view. When someone speaks, participants can follow the yellow frame that borders the video of who is speaking at any given time. Zoom will also bump the active speaker in gallery view to the front left of your screen or thumbnail. On a smartphone, to switch from active to gallery view, a participant would need to swipe left to see up to four videos. On a tablet, a participant will need to click the icon that looks like a grid to enable gallery view.

3. **Floating Thumbnail View:** The floating thumbnail window allows you to minimize the main Zoom window but keep the video on top of other applications you have open. You can move the window around your screen as needed or hide the video entirely. This view is primarily for laptop or desktop users who can minimize and maximize various windows.

4. **Follow Host’s Video Order:** In gallery view, you as the host can click and drag participant’s videos to reorder them on your screen. If you are doing an activity where you want to hear everyone’s voice and order matters, you are able to rearrange participant videos and have participants see the same video order on their screen by clicking “Follow host’s video order.”

**An important note:** In order to enable these videoconference view options, you and those attending your study must have updated their desktop or mobile client app to 5.2.2 or higher. For more detailed instructions on video layout and views please see this article: support.zoom.us/hc/en-us/articles/201362323-Changing-the-video-layout-Active-Speaker-View-and-Gallery-View-
D. How to Share Content: Slides, Videos, Music #Screenshare

1. Watch: 1:10-minute video overview: support.zoom.us/hc/en-us/articles/201362153-Sharing-your-screen-content-or-second-camera

2. Using Powerpoint or Keynote: When sharing slides, if you start your slideshow or play it from the start, you will notice Zoom automatically shifts your slideshow view into full-window mode. This is useful if you plan to lead your study with two separate screens (dual monitors), one displaying slides, the other displaying your presenter view. However, we all don’t have two monitors. So, with a single screen, you can change the setting on Powerpoint and Keynote to “Play the slideshow in a window.” This way when sharing your slides, you can reduce your slideshow view and still be able to see participants in another window on Zoom.

For more step-by-step instructions see “Single monitor setup with slide show view in a window” in this article: support.zoom.us/hc/en-us/articles/203395347-Screen-sharing-a-PowerPoint-presentation

3. Slides as Virtual Background: If you want a more interactive presentation experience, you might want to try sharing your slides as a virtual background. This allows the participants to view your video imposed directly on the screenshare. It also allows you to manage your presentation directly from within the Zoom meeting controls. This is useful if you are presenting content where your slides are ordered in succession. If you are presenting and need slides in no particular order, this Zoom feature only allows you to move forward or backward. For more instructions, see: support.zoom.us/hc/en-us/articles/360046912351-Sharing-slides-as-a-Virtual-Background

4. Audio Only: There may be times when you just want to share a song; for a quality audio experience we recommend you click on Share screen > Advanced tab > Music or Computer Sound Only. This step will allow you to share music directly from your computer’s sound card, without having to share an entire window. This also avoids sharing music through your computer’s speakers, which can sound distorted to your participants. If you’re not sure if you have permission to share a certain song, please see “United Methodist Women Copyright and Permissions Guide for Virtual Meetings,” unitedmethodistwomen.org/Media/PDF/VirtualEventsCopyrightsPermissionsGuide.pdf

5. Sharing Video: While playing a video directly from your computer always produces the best quality, you can also stream videos to the group. We recommend making sure when you screenshare that you click the bottom two boxes “Share computer sound” and “Optimize for full-screen video clip.” See this article for more details: support.zoom.us/hc/en-us/articles/202954249-Optimizing-a-shared-video-clip-in-full-screen
E. Chat Function

The chat box can serve a multitude of purposes in a learning space. As you prepare to lead a study, consider the chat function as a way of capturing a group’s greetings and good-byes, quick responses, and rapid questions and answers. We encourage you to use the chat box as a place to also copy and paste instructions as you would on a newsprint or a whiteboard. Remember the content on your slides will not be visible once your participants leave the main session. The text placed in the main session’s chat box, however, carries over to breakout rooms. It’s helpful to direct participants that if they forget their prompt or instructions, it will be in their chat as reference.

1. **Tips:** If you plan to use the chat function repeatedly and frequently, we recommend that you find someone to help you manage the chat, to pay attention to what’s added there, and to tend to questions or comments that may surface periodically. This could be the person you have designated as your co-host or, for a particular activity, any participant can serve in this role. Provide your co-host with a schedule of your session (see Appendix for a scheduling template) and make sure to run through their role ahead of time.

2. **There are settings on Zoom** that can limit direct messages and public messaging functions. When setting up your meeting, review your chat function and choose the setting that would best serve the needs of the study. Continue to offer guidance on how participants can use the chat to support their learning and that of others.

3. **Saving the chat:** Participants may want a copy of the chat. Feel free to guide them to download it by clicking the three dots at the bottom of their chat box, which will prompt them to download a .txt file. If you are the host of the meeting, the chat text will automatically save in the folder you designate.
F. Breakout Rooms or Breakout Groups
Think of breakouts as a way to divide a larger group in your main session into smaller pairs, triads, or small groups of four or five. There are tons of possibilities with breakouts and, as in any class or learning space, the question is always how does function serve the goals of your session? We encourage that Mission u studies not be taught solely as webinars or presentations that deliver content in one direction. With breakouts, you can invite greater engagement and participation. A few tips that might be helpful:

1. **Set up early:** Prior to your session or activity decide how many participants per breakout room are needed and set the rooms up so you can launch them when you’re ready. When setting them up, decide how long the breakout rooms will stay open and how much lead time to give your group to wrap up before the rooms close (30–120 seconds). If for some reason the countdown to close begins and groups are not yet ready to return to the main session, as the host you can select to keep them open.

2. **Manual, Automatic, Self-Select:** There are a few ways to get your participants into breakouts.
   a) “Manual” means the host assigns each participant into specific breakout rooms. Manual is helpful if you need to be intentional and specific about the groupings of your participants. Depending on the size of your group, manual will also take longer to launch in real-time!
   b) “Automatic” shuffles participants based on numbers of participants per room, so this is randomized when specificity is not needed. This option saves on time.
c) “Self-Select” allows participants to join the breakout room of their choice. If self-select is enabled, participants can move freely between breakout rooms without needing the Host to guide or assign them. Self-select can be useful in giving participants the choice to go where they need or want to go. Perhaps in a study you want participants to discuss various themes that they found interesting in a particular reading. The host renames the breakout rooms based on the various themes and participants then join the theme they prefer to dig into more deeply. Both the meeting host and participants need to be on client app 5.3.0 or later to self-select breakout rooms.

d) We encourage you to review these tips and practice! More detailed steps for managing breakout rooms are provided here: support.zoom.us/hc/en-us/articles/206476313-Managing-Breakout-Rooms

3. **Broadcast**: As host, you can use the broadcast function to send messages to every breakout group. You can broadcast how much time is left and if there are any reminders or additional instructions.

4. **Ask for Help**: Should a participant in a breakout room need assistance, guide them to click the question mark icon in their meeting control. It will notify the meeting host that they need assistance, and you will be asked to join their breakout room. For more instructions on helping participants in breakouts go here: support.zoom.us/hc/en-us/articles/115005769646-Participating-in-breakout-rooms

5. **For more step-by-step instructions** on using breakout rooms, see:
   a) How to enable or set up breakouts: support.zoom.us/hc/en-us/articles/206476093-Enabling-breakout-rooms
   b) How to manage breakouts: support.zoom.us/hc/en-us/articles/206476313-Managing-Breakout-Rooms
II. Additional Zoom Features

A. **Annotation** is a way of sharing a screen, slide, picture or document and interacting with it by writing, highlighting or drawing directly on it. Say you have an excerpt in your study that you want to read in your session. After you screenshare that PDF or image, with annotation you can highlight or underline key quotes or phrases. If you enable group annotation, then your participants can interact with the PDF or image at the same time. For an opening meditation activity, for example, you can screenshare a coloring page, enable group annotation, and have participants color the page together. The great thing about annotation is that when you or your group have finished, you can save the work as an image or PDF and email it to your participants later. For more step-by-step instructions see: [support.zoom.us/hc/en-us/articles/115005706806-Using-annotation-tools-on-a-shared-screen-or-whiteboard](support.zoom.us/hc/en-us/articles/115005706806-Using-annotation-tools-on-a-shared-screen-or-whiteboard)

B. **Polls** are a great way of getting real-time information from participants like you would when conducting a brief survey. You can use the poll for light-hearted games or icebreakers, for example, “If you were stranded on an island and could only eat one thing, which of these foods would you choose?” For more sensitive data like collecting demographics or requesting the group’s feedback on a difficult session or activity, you might want the poll to be answered anonymously. Make sure participants know which polls are anonymous and which are not. This way we practice consent whenever we gather people’s information. Find more instructions here: [support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings](support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings)
III. Creating and Sustaining a Virtual Learning Community

A. Crafting a Hospitable and Welcoming Space

1. **Preparing your participants ahead of time in Zoom:** When preparing participants to join, we recommend scheduling an orientation and some practice together before your sessions go live. At this orientation, you or your co-host can walk through the meeting controls, and some basic features that will be used in your sessions. We almost always learn the platform when we have to teach another.

2. A good practice is whenever transitioning into another activity on Zoom, make sure to plan a few minutes with the participants to review the Zoom features or controls and remind them to seek or ask for help should they need it.

3. Assure those who are new to Zoom that mistakes are normal. Invite your group to dole out extra measures of grace and patience as we navigate online learning. Create an atmosphere of shared responsibility. Maybe there’s someone in your group who has a lot of experience and wouldn’t mind assisting others during a particular session or activity.

B. Ensuring Access

1. **Access Needs:** What do participants need to feel present and cared for in this space? Feel free to ask this before leading your study and even during! For those who might need to see a larger print of your slides or handouts, consider emailing them ahead of time.

2. **Allow extra time** before each new session to provide tech-support for participants who might need it.

3. **When introducing activities,** build extra time for participants to locate the function or controls on their respective devices. Remember the view on a computer will be different than on a tablet and smartphone.

   a) **Closed Captions:** If this is enabled you will have the option to manually type closed captions, assign someone to that role or enable live transcription. A November 2020 update allows you to “Enable live transcription service to show transcript on the side panel in meeting,” which provides subtitles in real-time. Transcription is slightly delayed and not always accurate, but if you annunciate, project your voice and speak at a slower pace, it will transcribe with more accuracy. See this 2-minute video and article to set up closed captioning: [support.zoom.us](https://support.zoom.us/hc/en-us/articles/207279736-Managing-and-viewing-closed-captioning)
C. Help or Assistance

1. In large groups, one way of making sure you and your co-host(s) are easily found is by adding an * asterisk in front of your name. You can also add HELP or HOST. That way participants can easily search for you should they need to request assistance.

2. In addition, consider providing a direct phone number so participants can call you should they get stuck.

3. To communicate with your co-hosts during the sessions, consider being on a group message or text with them so you can easily reach each other and troubleshoot as needed.

D. Bridging Connections and Building Relationships

A huge part of Mission u is learning together. Try to find simple and low-tech ways to create human connection. As you would in person, how do you build fun and fellowship into your sessions?

Try a game like Pictionary: Name a theme, have someone draw a picture and others have to guess the theme, or perhaps invite movement with charades. Or what about playing a few seconds of traditional hymns or gospel songs and the first person to correctly “Name Three Tunes” wins? We may be meeting online rather than in person, but it doesn’t mean we can’t have fun.

Other low-tech ways of building connections among the participants might be asking them if there are unique places, recipes or famous people that come from their hometowns. How might participants bring a piece of who they are to the sessions and build community that way? How might your group celebrate one another? How do you illuminate the learning journey of the group?

As the host and/or co-host you have such an opportunity to co-create a learning community; whether that’s over a single session or eight consecutive sessions, it is possible!

E. Accommodating Multiple Learning Styles

We all learn differently and we can still do so online! The following are four types of learning styles that are typically classified, but in reality there are so many more! These four categories serve as reminders to vary your approaches online.

1. Auditory: There are those who learn best when the subject matter is reinforced by sound. They may listen to a lecture more readily than take notes, or prefer to verbalize out loud what they are learning. Small group discussions in breakouts and sharing video, film and audio sources like podcasts or music might be welcome ways to engage auditory learners online.

2. Kinesthetic-Tactile: These learners are best when they are doing activities and figuring things out with their hands. They don’t sit still for long! Are there ways to move a session outdoors? Could an activity include crafts, paint, molding clay, pipe cleaners? In what ways can you activate kinesthetic learners?
3. **Reading/Writing:** Traditional school is really set up for those who learn best through the written word. Try including journaling exercises and quiet reading of excerpts, articles or poems for these learners.

4. **Visual-Spatial:** Visual learners do best when seeing or observing through photography, diagrams and images. They might doodle or take copious notes. Engage these learners online perhaps by adding art or a poignant image on your slides or use the annotation feature to get them drawing, doodling or learning visually.

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**Conclusion**

We look forward to all that you will learn and discover as you lead Mission u curricula virtually. There are leaders, just like you, who are trying new things and reaching those who otherwise would not have attended a Mission u event or study in person. If you are not yet an official study leader for one of our upcoming Mission u events or if you are interested in leading a curriculum for a United Methodist Women unit, church small group, retreat or Sunday school, let us know by emailing our team at: icmers@unitedmethodistwomen.org. We will be happy to share our particular approach to Transformative Education and provide some support to those who are leading a study for the first time.
Appendix: Study Session Planner: Zoom Template

The template on page 15 can serve as a planning tool when designing your study sessions on Zoom. Below is the link to an online google document to download and use as needed or you can print the template included in this guide. docs.google.com/document/d/1sUxV5KJoQGSReRRCmWsFfpOryDFrNJOV60hq_lK1-c/edit?usp=sharing

How to Use This Session Planner

**Timing:** See the columns labeled **Time** and **Host Time.** Adding the time when an activity begins and how many minutes you can allot for it can guide you and all those involved in your session. The Host Time outlines the specific actions and time needed for an activity. Below is an example of what it might take to launch and close a small group discussion in breakouts if there is a Zoom host, study leader/facilitator, and a co-host. Sometimes the host is also the study leader, but we encourage that at minimum you facilitate with a Zoom host or co-host. The host’s timing for 15-minute breakouts might look like this, including a 5-minute broadcast to remind groups of the time remaining, with a 60-second countdown in place.

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity Title</th>
<th>Host (Tech) Actions</th>
<th>Leader Notes/Script</th>
<th>Co-Host Actions</th>
<th>Chat Box</th>
<th>Notes</th>
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<tbody>
<tr>
<td>2:15</td>
<td>Small Group Discussion</td>
<td>Launch, Close, Broadcast, Screen-</td>
<td>Give instructions</td>
<td>Screenshare, Polls,</td>
<td>Copy and</td>
<td>In your small groups, discuss the following question for the next 15 minutes and have one person ready to share 1–2 highlights when you return to the main session.</td>
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<td>20 minutes total</td>
<td>share, Polls, Waiting Room etc.</td>
<td>to breakouts.</td>
<td>Waiting Room etc.</td>
<td>paste</td>
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<td>2:20</td>
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<td>2:20</td>
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<td>into chat</td>
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<td>2:30</td>
<td></td>
<td>Launch breakouts</td>
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<td>2:34</td>
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<td>Broadcast: 5 minutes left for</td>
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<td>Groups return to main session.</td>
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**Adapt and edit** this template to fit your needs. You may not need two separate columns for **Host** and **Co-Host.** If you’re comfortable leading a group and having just one host manage all your technology, then feel free to merge those columns. This is a template to organize the technology and controls needed to lead your session on Zoom. If you choose to lead a study as the Zoom host, there will be a lot of multitasking. So we encourage that you both plan and delegate some of the hosting on Zoom. Perhaps as the leader, with the Zoom license, you can be in charge of screensharing your slides, but transfer the hosting to someone else who can be in charge of opening and closing breakouts. That way you can give instructions while someone else sets the breakout rooms up.
## Session Planner: Zoom Template

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<td>Launch, Close, Breakouts, Screenshare, Polls, Waiting Room etc.</td>
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