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Message from NAMI Virginia

Social distancing, while important for safety reasons, can be extremely difficult for people living with mental health conditions and their families. We understand the closure of NAMI in person programming may intensify the anxiety and stress felt by the impact of COVID-19. Supporting our communities and members during this time is a top priority. At this point, the focus of all three levels of NAMI is connecting our program participants, program leaders, and members to one of the foundational elements of NAMI, support. Determining how to offer programming while navigating social distancing is a difficult topic and hopefully this guide will provide the guideposts for your affiliate’s course of action. Remember, this is new for everyone and we anticipate more changes and updates as we work through this process!

This guide is intended to help you in addressing the following questions:

1. What can your affiliate offer during this time?
2. What online platform will your affiliate use to provide programming?
3. How will you prepare your program leaders to use these platforms?
4. How will you market these forms of support to your members?
5. Requirements of Model B affiliates are in bold which should be viewed as recommendations for Model A affiliates

Technical notes:

- If you see a hyperlink, make sure to hold the control button and double click the link with your mouse.

Please use this guide as an addendum to NAMI National’s Online Program Guide

NAMI National released an extensive guide on offering NAMI Programs online and we highly encourage you to review and then use the NAMI VA Guide as an Addendum. Note: Continue to report data as you have previously and not how described in their manual

In that guide, you will see such topics covered as:

*How Do NAMI Programs Change When They Are Offered Online?*

*Online Requirements Across All NAMI Programs*
Online Guidelines: NAMI Classes—Before, During, and After

NAMI Family-to-Family: Adapting Activities for Online Platforms

NAMI Peer-to-Peer: Adapting Activities for Online Platforms

First Steps

The first step in this process is determining what, if any, programming you want to offer online. Due to the current impact of COVID-19, NAMI has approved the use of online platforms for all educational, support, and presentation programs; however, moving an in-person program to an online model is not an easy process. Should you wish to pursue, be prepared for frequent trial and error. For this reason, NAMI Virginia strongly encourage all affiliates to focus on establishing online support groups before considering online education.

Things to Consider

- Does our affiliate need additional insurance to cover online programming?
  - No, our research has indicated additional policies are not necessary; however important information around communicating security and privacy should be shared with participants to mitigate issues. Requirements for Model B Affiliates are listed below, and should serve as strong suggestions for Model A Affiliates.

- Can we use conference call capability exclusively?
  - Per NAMI recommendations for fidelity, all affiliates are encouraged to use an online platform with video and audio capability. This promotes a “virtual” in person connection and allows for screen sharing of program materials in order to maintain fidelity. However, participants can opt to use only audio if they prefer.

- Is this still considered a NAMI program?
  - Yes. All programs must to adhere to the program fidelity and policies that applies to in-person programs:
    i. Two leaders at all time.
    ii. Use of any materials related to the fidelity of the program including charts, sand-timers, and manuals. (For educational courses, we can send you PDFs of the manual to send to participants class-by-class.)
    iii. Groups should have no more than 16 participants. While many in person groups have surpassed this number, monitoring participants in an online room may involve unique challenges and issues with internet connection and sound. Therefore, it’s important for the group structure and flow for the number to stay at 16.
    iv. Enter data when the course has finished. Chloe Sanders will be contacting you every 2 weeks to check-in about numbers, progress and questions. Please e-mail her at csanders@namivirginia.org if you have questions in the meantime.
• **What should we try and place online?**
  - All NAMI support groups and educational programs can be moved online. This does not mean you have to continue offering the same amount of programming. If your affiliates would like to start with only one of each to assess demand and capacity that is perfectly acceptable. For educational courses, we suggest that you finish classes you had to pause due to COVID-19 before trying to start new classes from scratch.

• **Are there any requirements from NAMI Virginia in offering programs online?**
  - **Model B Affiliates** must develop and submit an online implementation timeline template to NAMI Virginia for approval (template provided in “Prepare to Move Online” section) for each program they would like to place online. We would recommend this process for Model A’s.

**Picking a Platform**

The second step in this process is deciding what type of platform to utilize for online support. There are a lot of options and each has their own pros and cons. NAMI Coastal Virginia shared a breakdown of their top three options, [which you can view here](#). Additional alternative platforms can be [found here](#).

**Things to Consider**

**Does it have to include visual capability?**

- Per NAMI recommendations for fidelity, all affiliates are encouraged to use an online platform with video and audio capability. This promotes a “virtual” in person connection and allows for screen sharing of program materials in order to maintain fidelity. However, participants can opt to use only audio if they prefer.

**Is having a “secure” platform important?**

- Yes, although “secure” can mean many things. In this context, online platforms have many different secure functions that may make participants feel more comfortable.
- You will want a platform where you can disable a recording option.
- Certain platforms offer an encrypted security which protects the data of your participants. So while it’s not a requirement, it will be important to know the security features of your platform and be transparent with participants about any limitations they may present.
- Most platforms will collect participant data. Platforms with built in technology to protect the sharing of that data can be important for participants with
It will be important to know what, if any data, your platform collects and to alert your participants at the start of your online group.

- Per NAMI national education policies, all NAMI programs are required to honor the privacy and safety of each program participant. We therefore encourage you to choose platforms that will help you safeguard confidentiality.

**Does it need to be HIPPA compliant?**

- No, HIPPA is not a requirement for NAMI programming. However, HIPPA encryption provides advanced security and may be purchased from certain platforms as an add-on. It is up to your affiliate if you would prefer to have that option. Again, it is not a requirement.

**Should program leaders and participants be able to access the group from other devices, such as smart phones, tablets or computers?**

- Yes, having the ability to join from different devices allows more individuals to join and benefit from your support group.

**NAMI Virginia Online Platform Recommendation: Zoom**

This platform has been identified as the most popular option among affiliates and other state offices to date because of its features and technology best meet the fidelity, goals and needs of NAMI programs and program leaders.

Zoom offers a free version for anyone who would like to test out the platform before purchasing a plan. However, we will require affiliates use a paid version in order to meet the fidelity of the model:

- 90-minute group times (free version only offers 40 minute limits)
- More than 1 facilitator with the ability to “host the meeting”
- $The 14.99 version meets all of those requirements. (Again, paid versions are listed here.)

While we encourage affiliates to utilize Zoom for all programming in order to streamline efforts, we suggest testing Zoom in advance of educational courses to determine what your affiliate is most comfortable with. Many other NAMI states and affiliates feel that GoToMeeting is a platform that they prefer for educational programs only. Click here for a review of additional platforms

If you would like more information from other affiliates who have utilized a platform, let us know.

**NAMI Virginia is requiring all Model B Affiliates use one of the Zoom business plans ($14.99 a month or up) to implement their online support groups. If there is another platform that**
your affiliate would prefer, please indicate the reasons on your implementation timeline plan.

If your Model A or Model B Affiliate is unable to cover the cost or ability to facilitate with your current leaders, then let us know and we can discuss alternative options.

If you use Zoom, the key to successful security and protection is a very strong password.

To learn more about Zoom:

- Tutorial on joining a zoom meeting: https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting
- Frequently asked questions https://support.zoom.us/hc/en-us/sections/200277708-Frequently-Asked-Questions
- Zoom help center: https://support.zoom.us/hc/en-us

Zoom Security for Online Programming and Promotions

Given the increase of online platform usage due to social distancing, Zoom has become a target for security breaches known as “zoom-bombing.” NAMI Virginia understands this has caused anxiety and stress for affiliates who are working to provide online support groups with this platform. In a thorough review of the concerns, we still view Zoom as the best platform at present for our efforts. Below we have outlined steps and tips for affiliates to take as additional precautions in order to mitigate the problem issues identified with this platform.

What is Zoom-Bombing?

Unwanted attendees (or hackers) who try to interrupt meetings in a number of disruptive capacities. This gatecrashing, or “Zoom-bombing,” has been reported nationally and is seen more frequently among online college campus classes.

How Best to Promoting your Online Group using Zoom:

1. The FBI, Zoom and other publications have warned against sharing the direct link for your meeting on a public site/social media. They recommend creating a password protected meeting and sharing that link/password to people who register for the event or by “invite only”.
   a. While we understand that in person groups are open to the public, online programming requires a different approach in order to address these specific security concerns, and requiring one extra step to access the group will significantly decrease the opportunity for bombers to gain access.
b. One extra step can include language on your webpage asking anyone who is interested to email the affiliate helpline (or a designated facilitator) to retrieve the link.

c. When publicizing your group, we still suggest creating a separate webpage or additional information to your current program page to highlight and bring viewer attention to your online programming. And please share this updated page with NAMI Virginia so we can send people to the correct location for information in your locality. We will not promote statewide unless you provide approval, and even then, those wishing to join must meet the steps you have put in place to gain access to the meeting.

2. Zoom suggests creating a new meeting each time and eliminate the recurring option.
   a. When creating a meeting, enable the options “Require a password when scheduling new meetings”; and “Require a password for instant meetings.”
   b. Disable the option “Embed password in meeting link for one-click join” and enable “Require password for participants joining by phone.” – Forbes Magazine

3. On your webpage that promotes your meetings, make a note reminding participants to update their version of remote access/meeting applications. In January 2020, Zoom updated their software. In their security update, the teleconference software provider added passwords by default for meetings and disabled the ability to randomly scan for meetings to join.

4. Ensure that your affiliate’s privacy policy is linked on your online programming page. For Model B Affiliates, make sure NAMI Virginia’s is listed.

**Security and Tips while Hosting Online Meeting (Pulled from Zoom Blog):**

- Lock the Meeting after your meeting time starts. To do this, click Participants at the bottom of your Zoom window. In the participant’s pop-up box, you will see a button that says Lock Meeting. When you lock the meeting, no new participants can join, even if they have the meeting ID and password.

  - Again, we understand that this is does not align with certain program values. However, online programming may require shifts in order to meet the security needs of all participants. One way to alert participants is to place language on your online support group webpage so they are informed of these changes in the online format. For example, “Due to the need to protect all program participants, access to the online group will be closed at 15 minutes past the start time.”

- Expel a Participant: In the participant menu, you can hover the mouse over a participant’s name, and several options will appear, including Remove. Click that option to kick a participant out of the meeting. They can’t get back in if you then click Lock Meeting.
Prevent Participants from Screen Sharing: In the host controls, click the arrow next to Share Screen and click Advanced Sharing Options. Under “Who can share?” choose “Only Host” and close the window.

Attendee On-Hold: if you need a private moment, you can put attendees on-hold. The attendee’s video and audio connections will be disabled momentarily. Click on the attendee’s video thumbnail and select Start Attendee On-Hold to activate this feature.

Disabling Video: Instructors can turn participant video off and request to start participant video. This will allow instructors to block unwanted, distracting or inappropriate gestures on video.

Disable Recording feature: go to the “Recording” under settings and turn off “Allow hosts and participants to record the meeting to a local file”, turn off “Allow hosts to record and save the meeting/webinar in the cloud” and make sure “Automatic recording” is turned off.

Mute participants or Mute All: Instructors can turn mute / unmute participants or all. This will allow instructors to block unwanted, distracting or inappropriate noise from the meeting.

Use the Waiting Room feature. This will require the host to approve every participant before entry into the meeting. Keep in mind that if a participant is disconnected, you will need to re-approve them for entry, so this option requires keeping an eye on your Zoom notifications during the meeting.

- The FBI, Zoom and other accounts recommend adopting both the waiting room feature and password protected links in order to increase your security. However, many other articles describe it as an either/or option. NAMI Virginia encourages offering the most secure option available.
- NAMI NOVA utilizes the waiting room and requests that people introduce themselves if they are only using a phone. If you publicize your link on your site, then you cannot guarantee that you will know everyone who enters the room. This is why registration is recommended or sending a “by invite only” email to current participants.

Don’t use the same password for your Zoom account that you use for other systems.

Enable “Hide billing information from administrators” under settings; and consider changing the length of the Host Key to 10 numbers to make it harder to guess.

NAMI NOVA created a quick guide on Zoom settings to help get you started on increasing security.

NAMI Virginia Recommendations for Promoting and Managing Online Programs with Zoom:

1. We recommend using password protection AND enabling waitlist function. Registration, “invite only”, or implementing one extra step are ideal for increased security. If the number exceeds 16, Zoom has the option to break the group into two smaller groups.
a. NAMI Virginia plans to adopt the “one extra step” system for our statewide groups. We will include language on our webpage guiding participants to emailing our helpline to request access to the support group. This maintains the inclusive feel that “registration” might not imply.

2. When marketing your group on your website, include all information needed to guide participants:
   a. Link for registration
   b. Any details about the group (who is it for, will the room be locked at some point, zoom participant guides etc.)
   c. Privacy policy

3. NAMI Virginia can promote online programs that affiliates authorize them to share with anyone in the state. This will not include direct information on joining but linking people to their affiliate to inquire about local online program availability.

Zoom Updates and Information

Zoom is constantly making changes to their security in order to address these concerns. We recommend subscribing to their blog in order to receive the latest updates:

For more information:

- From the Zoom blog: Best Practices for Securing Your Virtual Classroom
  From the Electronic Frontier Foundation: Harden Your Zoom Settings to Protect Your Privacy and Avoid Trolls
- From Zoom: A message to our users

From Forbes Magazine: Use Zoom? Here are 7 Essential Steps You Can Take to Secure It

Preparing to Move Support Groups Online

Once you have identified the best platform for your affiliate, the next step is to develop the details around implementation. Please review the NAMI Guide for additional information.

Things to consider:

Do I have to use two facilitators?

Yes. In order to maintain fidelity of the model, you will need to identify two facilitators for each meeting.

If facilitators are uncomfortable with the platform, set up a time to “meet” with them using the platform.

Do the groups need to be at the same time as the in person meetings?
Nope! One of the best parts of using an online platform is the flexibility of scheduling meetings. You can determine that your affiliate will offer one NAMI Connection group every Wednesday at 12pm if that is what your facilitators prefer.

Do we need to alert participants of their privacy rights?

Yes, all Model B Affiliates must share NAMI Virginia’s temporary disclaimer related to third party platform privacy (in implementation plan template provided below) when hosting online groups via Zoom. NAMI Virginia hopes to have a new Privacy Policy approved shortly which will replace the need to use the disclaimer. When that is available, Model B Affiliate’s must share the policy at each meeting. Model A Affiliate’s are encouraged to share something similar, either a disclaimer or a link to sufficient privacy policies that include third party platforms. How can I support facilitators during the meetings if I am not comfortable with technology?

We advise identifying any additional person to serve as tech support for each meeting to address issues that might arise or resolve individual questions/challenges related to the platform.

NAMI Virginia staff may also assist with technology and offer trainings for facilitators if the affiliate requests support.

What do we do if we have over 16 people in the group?

Zoom business plans offer the option to split groups into two online “rooms” with one facilitator in each. This is very similar to how we would handle splitting a group for an in person meeting. This process should be tested prior to starting the group.

What happens if we need to talk with a participant separately?

See response above. You would take that person out of the group and place them in another “room” with one of the facilitators.

How can I make sure that my facilitators are comfortable with the platform?

We advise affiliates host a trial run meeting to serve as a practice/final training with facilitators to go over the program model, technology, and answer any questions. This is important so that facilitators/tech support see both sides of the platform and how to use/troubleshoot.

We also strongly advise having an additional person from the affiliate on each online support group as the Zoom host who serves as tech support for the
meeting. This person would be responsible for address/managing technical issues while the facilitators get to the business of group support and dynamics. Here is a sample job description for tech support person.

NAMI Northern Virginia recorded their Zoom facilitator training. It runs roughly 37 minutes and is a great option for other affiliates.

But how will we know if the platform works for the support group model?

Great question! The trial run should help, but we would also advise hosting a “pilot” first meeting with a reduced audience before publicizing far and wide. We suggest inviting veteran group members to join to help develop a more familiar setting for the facilitators’ first meeting and get input on how the in-person model is coming across in an online platform.

What if we mess up or it goes badly?

That’s okay! Take a deep breath and remember that we are all navigating this new territory together. We anticipate you may need to reassess and make changes even after your online support group meetings go “public.” Have your facilitators take notes and make sure your coordinators schedule brief touch bases following meetings.

Preparing to Move Educational Courses Online

Things to consider:

Do the classes need to be at the same time as the in-person meetings?

- Nope! One of the best parts of using an online platform is the flexibility of scheduling meetings. It is about what works best for the participants and leaders, but there should as much consistency as possible for the duration of the course.

How do we operate registration?

- Think of registration as the time to get the contact information you need from participants in addition to information you may need before their screening call.
- This should at least include a name and e-mail address and some basic assurance they meet requirements of a specific program. E-mail address is especially important since everything is online. Also, think about when you would like to gather emergency contact name and e-mail.
- Communication with participants is a vital part of offering educational courses online because of the technology, materials, and additional changes. We
suggest having a deadline for online classes in order to help streamline this communication.

How do we market the group?

- We suggest marketing your new class on your affiliate’s website and any social media communication your affiliate manages (Facebook, Instagram etc...)
- Things to include in marketing – the link for registration, a contact email in case someone has additional questions, and information about how the group will be offered (i.e. via zoom)
- Share your program course webpage link with local newspapers or websites.
- Send an e-mail out to your members or contact local mental health organizations or psychologist or counselor’s offices. Remember, most of our contact is now online so people will want to visually see how you are marketing your groups

We had to place our in person class on hold and now want to finish it online. Should the same leaders who were teaching the class in-person need to be the ones to finish teaching the course virtually if they had to stop before completing?

- Yes. the same leaders should be teaching the class. Additionally, if you were teaching the older Family-to-Family program in person, you will need to end with that same version online.

Do we need to alert participants of their privacy rights?

- Yes, all Model B Affiliates must share NAMI Virginia’s Privacy Policy at each meeting. The Privacy Policy can be found here on NAMI Virginia’s website here: [https://namivirginia.org/wp-content/uploads/sites/127/2020/04/Privacy-Policy-NAMI-Virginia-pdf.pdf](https://namivirginia.org/wp-content/uploads/sites/127/2020/04/Privacy-Policy-NAMI-Virginia-pdf.pdf) Model A Affiliate’s are encouraged to share something similar, either a disclaimer or a link to sufficient privacy policies that include third party platforms.

How can I support leaders during the meetings if I am not comfortable with technology?

- We advise identifying any additional person to serve as tech support for each meeting to address issues that might arise or resolve individual questions/challenges related to the platform.
- NAMI Virginia staff may also assist with technology and offer trainings for leaders if the affiliate requests support.

What do we do if we have over 16 people in the class?

- Due to working online and navigating possible technical challenges of online platforms and issues with connection, etc., classes should not exceed 16
participants unless you are finishing a class that had more than 16 and began in
person.

What happens if we need to talk with a participant separately?

- You would take that person out of the group and place them in another “room”
  with one of the leaders, which is possible to do within the zoom platform.

What do we do if a crisis situation should come up?

- NAMI National’s Guide has guidance about this and you can also find tips in
  “Guidance for program leaders”. Make sure you collect emergency contact
  information during the screening process.

How can I make sure that my leaders are comfortable with the platform?

- We advise affiliates host a trial run meeting to serve as a practice/final training
  with leaders to go over the program model, technology, and answer any
  questions. This is important so that leaders/tech support see both sides of the
  platform and how to use/troubleshoot. This could look like the leaders acting as
  leaders and a couple members of the affiliate acting as participants almost as
  they might practice in a program training.
- We also strongly advise having an additional person from the affiliate on each
  online course as the Zoom host who serves as tech support for the meeting. This
  person would be responsible for addressing/managing technical issues while
  leaders get to the business of group support and dynamics. Here is a sample job
  description for tech support person.

But how will we know if the platform works for the educational courses model?

- Great question! The trial run should help, but we would also advise not taking
  on managing too many courses at once and encouraging veteran leaders who
  are very comfortable with the material to teach one of your first courses so they
  are not having to adjust to the material and the technology all at once. This is
  new for all of us and we ask that you all be brave and innovative with us to
  make the changes needing to continue supporting and educating others.

Answers to Questions about Materials and Program Content

Due to the materials and regular structure of Educational Programs, we know questions may arise
from program leaders about best practices and what to do regarding what is usually required for
the class. NAMI National’s Online Programming Guide has covered class-by-class changes you can
make to adapt materials and activities so the classes work easier online. It is important that
leaders think of this course just like any other with the exception of it being virtual. Aside from
what has been discussed above, here are some possible and more specific answers to questions
you may get. We are all learning together, and if any questions ever come up that we haven’t addressed and you’re not sure how to answer, please reach out to us and we will do our best to brainstorm options and assist how we can. Don’t forget to remind leaders that the NAMI extranet that they access by signing into their account on www.nami.org is a great place to get digital copies of items they may need for their course.

I want to finish a course I already started—my participants have part of the manual, but not all of it—what should I do?

The state office can provide affiliate leaders with pdfs of workbooks/manuals chapter by chapter. Course leaders should not send out the full digital file of the manual if at all possible in keeping with the fidelity of the model. However, NAMI National does allow it. As they will need to make sure to have all participants’ contact information regardless, they can send an e-mail out before each class with a copy of the digital file for that week’s class and start with wherever they finished off for the physical copies. They do not need to send digital copies for the weeks’ prior.

We did not finish our class, but the participants already have the manual/workbook. Do I still need to send them digital copies? What should I do?

You do not need to send them digital copies of the class. Please encourage them to not look ahead and encourage them to focus on the current week just as if they were only being given one class as a time in staying with the fidelity of the model.

Is it mandatory that we use the power point slides now?

While it is not mandatory, we strongly encourage you to use PowerPoint slides during the class, especially to help participants have a visual medium to stay engaged. You can share your screen so participants can see the PowerPoints. However, we know playing the videos may be more difficult to stream, so find whatever works best for you. NAMI National has suggestions in their guide.

How should we play videos?

In order to play videos, we suggest that one of the leaders share their screen and play the video. To help with playback, when you play videos it may helpful to mute all the other participants so there isn’t conflicting sound. NAMI National has suggestions in their guide which we recommend viewing, including playing the video with closed captions to help with sound issues.

Do I still need to screen participants?

Yes, this is an absolute must. It just as important if not more to keep screening participants and to conduct them as close to the same way as prior to social-distancing. Please, be especially mindful that participants are in the right place to take this course mentally and
emotionally, as should a crisis situation occur, you will not be in the same physical space as them. You can find guidelines to screening participants on the extranet.

Once you complete screening, we suggest sending a welcome email to all participants that will include the following information:

1. The link to the zoom class
2. The chapter for the first class and a reminder of how the materials can be used. They can either print off a hard copy or use a separate sheet of paper to make notes etc...
3. Privacy information and how to make sure that the course is honoring the safety of the group. i.e. Send them reminders to try and sit in a separate place in their home and use headphones to assist with confidentiality.
4. Zoom participant tips (muting yourself when not speaking, zoom technical links to review in advance etc...)

Can we mail manuals or materials to a participant if they specifically ask for one?

With the current stay-at-home order, and to make sure- we keep the same guidelines for all participants and affiliates, we will not be able to send participant manuals from the state office and encourage that other affiliate’s follow suit.

Can a participant print a copy of that week’s workbook/manual pages on their own if they want to?

Yes, it is up to the participant and the affiliate.

My course requires a guest speaker—is this still required? What should I do?

Great question! Yes, just like all other aspects of normal required course content, this is required too. Plan the logistics of having a guest speaker just as you normally do, but instead of coming to your class in-person, they will just come to your class via zoom. You can let them know what time to “join” your class to make it more organized. We would recommend that you make sure beforehand that they are comfortable with zoom technology. If they are not, consider offering to meet them 1 on 1 via zoom or set up a phone call to better explain or send out an informational e-mail with instructions being sure to follow up.

Someone recently reached out to our affiliate about taking the course after seeing it advertised but will be starting late. Can they still join since it’s virtual?

It’s great that people are interested in your affiliate’s programs, but the same guidelines will need to be followed for joining virtual educational programs as for joining in-person educational programs, meaning that people are unable to start after class 2.
Can you still print certificates when participants complete the course?

Currently because of the stay-at-home order and since our staff is working remotely, we are unable to print certificates. We are happy to print certificates and send them to class leaders when we are no longer working remotely and practicing social distancing. You can find certificate templates on the program leader extranet if you are interested in sending them out digitally.

I was using the old F2F model for my class. I want to start back up virtually, but should I be using the new F2F model?

You would finish with the same model you started with, except it would just be virtual. NAMI still has digital materials for the old model on their website, so if you are need of anything, you can check to see if they have it there too.

How should I handle sign-in sheets? Do I still need to log when people attend?

Good question! We recommend that you have people register online before you screen participants. If you do this through a google form (you can see an example on our checklist for moving educational programs online), you can export results into an excel sheet and create a log to mark every week who is in attendance, as it will still be necessary to report data at the end and log who has been attending.

How should I hand in evaluations?

Please do not send evaluations for courses that are completed virtually to the NAMI VA Office. We have created digital google form version of the evaluation that will be sent to the affiliate leaders/course leader with the other digital materials. Please make sure to send the link to participants to complete when the course is finished. The link for these evaluations is also on the checklist guide.

How will people write in their workbooks?

Great question! We do not expect people to be editing within the PDF themselves and writing directly into it. Consider encouraging your participants to have some loose leaf paper with them when they take the virtual course, and writing their answers there instead of in the manual. Make sure to thank them for their flexibility. It is still necessary that they do all written activities just as they would normally.

**Helpful Tools to Get you started**

Please view our checklist guide for moving educational course programs online. On it, you will find:

- [Google Evaluation Form for P2P](#)
- [Google Evaluation form for F2F](#)
Online Etiquette

Facilitating online is different from facilitating in-person because of the lack of physical feedback (e.g. body language, seeing everyone at once). Your facilitation style may have to change. We recommend the following tips:

**Dress code:** Please adhere to the same grooming and dress guidelines followed for in-person groups. When working on camera, try avoiding shiny or busy patterns as they can appear distorted and distracting to participants.

**Camera:** Turn on your webcam. Although this is optional for attendees, turning on your webcam increases “your presence” and helps the audience feel more connected to you (a voice isn’t as compelling as a voice AND a face!).

- Please sit up straight with your face and torso pointed towards the camera. This is a physical way to show engagement for what your participants are saying.
- Avoid sitting with a window or bright light behind you as it cast darkness across your face and you won’t be visible to the group.

**Body Expressions:** Be aware of your eye movement and facial expressions. Cameras are sensitive and pick up movement so avoid rolling eyes, disparaging facial expressions, and playing with your hair, to name a few. You should not be playing a game or be engaged in texting while facilitating an online group. If your face and eyes are not facing the monitor, it appears as though you are not interested in the group.

**Space:** In order to limit distractions, make sure you are facilitating in a quiet and private place where you will not be bothered.

**Audio quality:** Be mindful of the audio quality of your home. Use a headset with a microphone if possible. Limit background noise or other things that would distract from your class.
**Verbal habits:** Try to avoid words such as “um,” “like,” “you know,” “I mean,” etc. when you lead programs online. This is especially true when dealing with pauses or silence.

**Be engaging.** Remember the context. You and your attendees are staring at a screen, not in a room with other people. Anything that is boring or distracting becomes even more so in this context. Keep your voice clear and easy to hear but be mindful of increasing or decreasing your voice’s volume.

**Technical Tips for Program Leaders**

**Arrive early.** As you would in an in-person program, arrive 15 minutes earlier than your attendees so you can check that the technology is working. The program leaders and tech person will use this time before the support group to address any technical questions attendees have. Do not start the support group process/sharing before the assigned time.

**Pay attention to the chat.** During the program, the producer/tech support person will monitor the chat box. However, they may need to send a message to program leaders alerting them of someone raising their hand, or wanting to say something. Throughout the group, facilitators will want to remind attendees that using the chat will mostly be for technology concerns (e.g. “I can’t hear audio” or “can you define what that term means?”) or quick yes/no replies to limit side conversations.

**Managing discussion.** When utilizing online platforms, speaking over one another is more likely given that other non-verbal cues are unavailable.

- Jump in first with a friendly reminder about how to participate and tell attendees to remember to unmute themselves when they’re speaking
- Encourage people to speak whenever possible or use the raise hand function to be part of the discussion.
- Make sure that attendees who are frequently interrupted get to speak and call on them to speak when appropriate (e.g. “Sam, I noticed you were also trying to say something. Could you jump in now?”).

**Allow for silence.** Without body language to rely on, it’s easy to get alarmed by silence and want to start talking. Remember that your attendees may also be unaware of how or when to respond. They may be thinking of what to say or it make take time to type a reply in chat. Allow for moments of silence longer than you usually offer and remind attendees about how they can participate (e.g. using feedback tools, speaking).

**Co-hosting abilities.** While there will be a tech person to support the needs of the group, both facilitators will be given co-hosting capabilities in order to manage participants and slides.

**Chat function.** Chat function for the whole group will be disabled and participants will only be able to chat directly with the tech person.

**Handling Difficult Situations**
It would be nearly impossible to go over every situation that can occur in a NAMI program; however, there are some situations that are more likely to happen in an online group. Here are some tips on how to handle these situations:

**Attendees arriving late**
- NAMI Virginia has encouraged affiliates to utilize the “lock the room” function after 15 minutes of starting. This rule should be clearly communicated during registration and advertising. If your affiliate uses Zoom, implement the waiting room function and use this to control who comes into the main room and when, and make sure you are displaying a message in the waiting room that explains this protocol.

**Attendees losing connection/logging off**
- Unfortunately, there’s no way to chase after someone who loses connection or logs off unless they decide to re-enter the group. The tech person will be on the lookout for any attendees that drop out of the group abruptly, so they can be ready to assist if they come back in.
- Acknowledge that the attendee has left the group, reassure the group (e.g. “We hope they’ll rejoin us”), and continue with leading the program.
- If there are indications that the attendee may be in danger (e.g. they make a comment before logging off, or were visibly/audibly upset), follow the emergency protocols listed below.

**Disruptive Participants**
- The first step would be to utilize the guides of your program fidelity (i.e. Group guidelines for support groups).
- If the participant does not adhere to rules of the group, then “pull them out” of the group via a breakout room and a private chat to redirect them.
- Do not ignore them or mute their audio lines.

**Online trolls:** A troll is someone who attends a group with the sole purpose of heckling, bullying, harassment, and/or voyeurism. They enter online spaces to make inflammatory comments, insult people, and cause general chaos.
- When a troll has been identified, they should be immediately banned/kicked out from the group. Do not argue or engage with them.
- The program leader should acknowledge what has happened and help the group process and move on.
  - Example script: “Hi everyone, I know what just happened was very unpleasant. We’ve banned the individual from re-entering the room; should they re-enter; we’ll ban them again. We ask that you not pay any attention to them and leave it to our team to handle them. Would the group like to process what just happened?”

**Responding to Emergencies**
- Due to the online nature of programs, handling of emergencies has limitations which need to be stated prior to and during the groups.
  - During the introduction script, tech support/facilitators will need to mention the limitations. Example: “Please note that due to the nature of using virtual support groups,
we do not have the resources to assist in crisis situations. If you are in a crisis situation, please call 911, the National Suicide Lifeline 800-273-TALK (8255), or Text NAMI to 741-741."

- For our purposes, an emergency is anything that you would use the Hot Potatoes strategy for. Use the Hot Potatoes strategy as directed.
- If the attendee is at the point where it is appropriate to call 911, one facilitator should pull the attendee out of the group by using a breakout room (as in Zoom) or host-only private chatting (as in Adobe Connect). If this is not an option, the facilitator should ask the attendee if they can call them, and then continue the debrief over the phone.
- During this one-on-one session, the facilitator should tell the attendee that they are also going to call the attendee’s emergency contact person so that the attendee can be redirected to crisis services (the producer can do this in the meantime). The facilitator should stay with the attendee until the emergency contact has been reached and is with the attendee, or until the attendee is safely with crisis services.
- Calling 911 is recommended if the emergency contact cannot be reached or if this is a physical health emergency. The person calling 911 should get the attendee’s location and explain the situation to the emergency responder, asking for a psychiatric crisis team or a CIT-trained officer if this is a mental health emergency. The facilitator should stay with the attendee until the crisis team arrives.
- If an attendee makes a comment that indicates they are a danger to themselves or others and then abruptly logs off, one facilitator should immediately contact that person’s emergency contact to explain the situation. Unfortunately, there is no way to “run after” someone who logs off, as it would be if someone physically ran out of the support group.
- While one leader is handling the emergency, the other leader should explain what is happening to the other attendees (e.g. “My co-facilitator is with the individual right now and we’re addressing the issue.”). Check on how people are feeling about this emergency and address the feelings before moving on. For Support Groups and CCB, use the most appropriate strategy in the Facilitator Guide (e.g. if someone else is feeling unsafe, use Hot Potatoes; if people are feeling hopeless about the general situation, use Principles of Support).

Managing Stress

Technology isn’t perfect and glitches do happen: Internet connections are lost, people can’t hear the audio, the screen won’t share, etc. Whenever these glitches happen, it’s normal to feel irritated, anxious, or flustered. When you find yourself in this situation, here are some things to remember:

- Rely on your team. Your producer will handle the technological side of the issue, while you and your co-facilitator should be communicating with your attendees (e.g. “We know that there are some tech issues going on and we want you to know that a member of our team is addressing it. We appreciate your patience.”).
- Utilize your stress management tools. To help you stay patient and calm, rely on the stress management tools that work for you. This can be asking attendees to take a quick break, doing breathing exercises, stretching, or whatever else will help you to stay grounded.
- Accept mistakes. Perfection is not achievable, and certainly not when dealing with an online platform. Mistakes will happen, and if you’ve done your due diligence before the support group
began, then you’ve done everything you could within your locus of control. Be kind to yourself, especially when things are not going smoothly.

Program Specific Adaptations

As with in-person NAMI programs, facilitators are expected to practice fidelity to the NAMI support group model. Online experiences, if anything, need more structure than in person experiences because of the lack of feedback from others.

Support Group Facilitation:

- Always use your Facilitator Guide.
- Start the NAMI support group with a brief opening of your choice, then go to the Agenda script in your Facilitator Guide. For Check-Ins, keep to time limits by asking attendees to time themselves using an online stopwatch or their phone; you should also be doing this while they speak.
- Using Charts: All group charts will be displayed on slides and made visible to program participants after the welcome script.
- Remember your code of conduct. Refrain from giving advice or acting in the role of a professional, monopolizing the group time, or lecturing/educating the group.
- If people aren’t talking, rely on the note you took during Check-In. Find common themes and return to them (e.g. “During Check-In, a lot of you talked about being lonely. Does anyone want to talk more about how that feels/what you’ve been doing/how that’s affected your life?”).
- Discuss with your affiliate/tech person how you may want to offer a “resource table.” Some ideas include having them in the form of a landing page or a downloads section. Alternatively, posting a link in the chat to your local NAMI state organization/affiliate resources is also acceptable.
- Using your Guide for participants who monopolize
  - As you would in an in-person group, gently remind the individual of the Group Guidelines. Thank them for their participation and say you’d also like to hear from other people.
- If the attendee continues to monopolize, do another gentle reminder (e.g. “Sam, I’d like to thank you for your participation again and I know there’s quite a lot on your mind right now. As the facilitator, I want to remind you of the Group Guidelines and would ask you to allow space for others to speak.”).

The NAMI support group model is there to keep you and your attendees safe and to keep group wisdom flowing in a productive and nonjudgmental way.

Educational Course:

Below are suggestions for how to adapt certain kinds of activities to online delivery. It is very important that teachers make note of these modifications before the class begins so that they are able to communicate directions clearly to their participants.

Video Sections:
• Videos take up a lot of bandwidth. We ask you to be mindful that your participants may have limited bandwidth and internet connectivity. There are three options you can use when prompted to show videos:
  • Screen share the video using audio
  • Screen share the video using the version with closed captioning, with the audio off to reduce bandwidth, so participants can read the text
  • Do not show the video and instead ask participants to follow along in their manual, looking at the graphics in their handouts.

Both of the 8-session versions of NAMI Family-to-Family (F2F) and NAMI Peer-to-Peer (P2P) include the full scripts of the videos in the leader manuals. A fourth option for both F2F and P2P would be to show the videos without audio with the teachers reading the script.

We do not recommend sharing the link to the video (either via email or posting it in chat), as this 1) may not be possible due to the video being on NAMINet and 2) may confuse participants who have to switch between the online platform and their Internet browser.

Pair-up or small group work

If you are using an online platform that has the capacity for multiple breakout rooms (like Zoom or Adobe Connect), you may split participants into pairs/small groups by putting them into those breakout rooms.

If you do not have this functionality, participants will have to do pair and triad activities in large group.

As an example from NAMI Peer-to-Peer, instead of having a pair check in together at the beginning of each class on how they did with their week’s goals, it would be done as a group check in. Instead of having I-statements/communications done in trio form with a speaker, listener and coach, the practice would be done by some volunteers in front of the full group. If there are audio delays that make it difficult for volunteers, teachers can demonstrate communication activities.

Activities that require physical movement

In F2F and P2P, there’s an activity where people get up and move to different parts of the room. This could be handled by having people use the feedback tools to raise their hands virtually; this would recreate the visual impact of this activity.

Tech Support Person

Purpose: To help facilitate the success of the group support experience by taking the responsibility of the technical related issues or potential challenges of the facilitators and placing with a person whose sole job it is to attend to them. The Tech Support Person should always be the designated “host.”

Key activities may include, but are not limited to the following:
• Address feedback (background noise) from individual participants that may disrupt the group. This can be accomplished by muting one or all and privately messaging the individual or everyone so they are aware, why, and how to unmute when needed.
• If someone joins the meeting late, the tech support person will note and message facilitators to alert them to greet them.
• Address questions from group via private message and loop facilitator in. Message facilitator if someone has raised their hand. If you need to split group, they can do that and ensure a facilitator goes to each group.
• If the group must be split due to numbers of participants the tech support is the host and can navigate splitting the group with a facilitator in each
• Will address the need for removing participants from the group, locking the room, and other security measures that might arise.
• Chat directly with the facilitators about issues that might come up or participants who may have had their hand raised too long.

Process Tip:
• It will be important to make sure your facilitators are well informed on when and how tech support may communicate with them so they know how to best utilize this information.
• It will be important to share early on in the meeting the purpose of the tech support so that participants know how/when to reach out to this person.

Zoom Checklist for Tech Support:

Setting up your Zoom

Log into your zoom account at zoom.us. Familiarize yourself with the account:

☐ Locate Settings button
☐ Locate Schedule meeting button
☐ Locate advanced options

On the left side, go to where it says “Settings.” Zoom has default settings, many of which you will keep.

Under the “Meetings Tab

☐ Prevent Participants from Screen Sharing:
  o Enable sharing screen. Under “Who can share?” choose “Only Host” and close the window.
☐ Enable waiting room feature
  o You can customize what participants see while they are in the waiting room.
☐ Disable Participants from Saving Chat
☐ Enable Co-hosts- Allow the host to add co-hosts
☐ Enable breakout room (scroll down to you get to “advance”)
Under the “Recordings” Tab

- Disable Recording feature:
  - Turn off “Allow hosts and participants to record the meeting to a local file”
  - Turn off “Allow hosts to record and save the meeting/webinar in the cloud”
  - Make sure “Automatic recording” is turned off.

On left hand side of account click on “Advanced”

- Enable “Hide billing information from administrators.” In your account, go to “advanced” on left side and click on security
- Consider changing the length of the Host Key to 10 numbers to make it harder to guess.

When Scheduling a Meeting

- Set start time for 15 minutes before the group typically begins to allow people time to figure out how to get on and allow facilitators and host to make sure everyone there belongs in that group
- Uncheck “Require meeting password”
- Under “Meeting Options”
  - Mute participants upon entry
  - Enable waiting room
- Enter alternative hosts in case the original host is unable to attend or be there at the beginning to start the meeting.

During Meetings

- Lock the Meeting after your meeting time starts.
  - click Participants at the bottom of your Zoom window. In the participant’s pop-up box, you will see a button that says Lock Meeting. When you lock the meeting, no new participants can join, even if they have the meeting ID and password.
- Expelling a Participant
  - In the participant’s menu, you can hover the mouse over a participant’s name, and several options will appear, including Remove. Click that option to kick a participant out of the meeting. They can’t get back in if you then click Lock Meeting.
- Attendee On-Hold: if you need a private moment, you can put attendees on-hold. The attendee’s video and audio connections will be disabled momentarily.
- Click on the attendee’s video thumbnail and select Start Attendee On-Hold to activate this feature.
- Disabling Video: Instructors can turn participant video off and request to start participant video. This will allow instructors to block unwanted, distracting or inappropriate gestures on video.
- Mute participants or Mute All: Instructors can turn mute / unmute participants or all. This will allow instructors to block unwanted, distracting or inappropriate noise from the meeting.
- Use the Waiting Room feature. This will require the host to approve every participant before entry into the meeting. Keep in mind that if a participant is disconnected, you will need to re-approve them for entry, so this option requires keeping an eye on your Zoom notifications during the meeting.
- How to pull them into breakout rooms
- Sharing your screen- there is a bottom at the bottom with an arrow pointing up, that means you can share your screen. Only hosts and co-hosts have this ability.
- Hiding your screen and turning off camera
- Review your script and make sure that you mention to participants:
  - How to mute/unmute themselves
  - How to operate camera
  - The chat function
  - How to raise their hand
  - Security safety

Reminders:

- You cannot switch settings while in the middle of a meeting

**NAMI Coastal Virginia Tech Support (or tech-savvy facilitator) Brief Cheat Sheet!**

As you get more comfortable in your role and have a better sense of what works for your group(s), feel free to edit this document to fit your needs! This is just a brief(ish) starter guide/organizational tool (in no particular order) that includes some broad things that have been helpful to mention and be mindful of. Thanks for all you’re doing – you’re awesome!

**Before the group starts**

- Sign on and open the meeting roughly 25-20 minutes before it is slated to start so you can iron out any issues that you may experience (you would think the powers that be in the technology realm would spare us - designated tech supporters - from hardship but alas...)
- Monitor the waiting room and allow the facilitators entry as soon as they log on and give them “co-host” functionality. This gives everyone a chance to set up their displays the way they want, strategize and get a general semblance of how the group will run – including best practices for admitting latecomers. Note: if you choose to “lock” the meeting at any point, individuals who try to
join late will get a message that simply says “meeting is locked, you cannot join.” Consider keeping the meeting unlocked and having a plan for monitoring the waiting room and addressing late attendees – this is covered again in the “During the meeting” portion of this guide.

- Make sure that the chat settings are set to “Participant can chat with host only.” This setting is found under the button with three dots right above the window to compose a message.
- Encourage facilitators to have their screen set up in gallery view and to have the “manage participants” and “chat” windows open throughout the meeting.
- When first admitting participants, rename them all to omit last names – during the introduction, we will make mention that we can tailor their display names to what they prefer.

**Introduction**

- Make sure everyone is muted except for you – it’s your time to shine!
- Share your screen with the group guidelines and principles of support – we have this formatted as a PowerPoint document (thank you NAMI Texas) so if you haven’t gotten that sent to you and would like it, just reach out! Generally this is left up during the tech person’s introduction as well as the facilitators opening of the group.
  - Open the PowerPoint presentation – it is only one slide – to have it cued up. Before making your introduction, click the green “Share Screen” button at the bottom and select the window that has the PowerPoint in it. Switch to “view slideshow” mode in PowerPoint so it takes up the whole screen.
- We have a general script that was written by NAMI NOVA and we have tailored slightly – feel free to read this script word-for-word or, as the groups progress, paraphrase where you want to. ALWAYS, though, be sure to discuss:
  - Confidentiality – we are not recording, nor does anything get saved in the chats or anywhere on our account. Additionally, for participants to do their part in the confidentiality zone, encourage them to use headphones and make sure they are in a space that isn’t heavily populated.
  - Comfort – If individuals want their display names to be something other than what is already on the screen, let them know they can do it themselves by clicking on “manage participants” and hovering over their own name, or sending one of us a message and we can do it for them.
  - Crisis response – we have limitations due to the nature of the group not being in person. Be sure to mention crisis resources AND put them in to the chat to everyone so that they are readily available should anyone need them.
  - Control – mention the controls available on zoom, specifically the audio/video connections on the bar at the bottom, the chat, and adjusting the view.

**Check-in**

- It has been beneficial for the tech support to be involved in the check-in, if you feel comfortable! These groups are supportive for everyone 😊
• As facilitators call on people for check-in, just be mindful of helping them to mute/unmute themselves. For instance, if they start talking but their mic is still off, click unmute so they aren’t interrupted and then, if need be, remind participants to unmute themselves before they check-in

During the meeting

• Pay attention to the waiting room for any latecomers. If someone enters the group late, admit them and send them a brief message thanking them for joining, informing them that they will be allowed a check-in when possible, and identify yourself and the facilitators in case they need to reach out with a specific question. Feel free to also send a message to one or both facilitators just so that person is on their radar and they can work in a non-disruptive check-in
• Monitor any chat messages that come to you and respond appropriately
  o If someone has a suggestion or a resource for the group, put it in the chat for everyone to utilize
  o If someone mentions a concern, notify the facilitators as well and decide the best course of action
  o Always encourage individuals to share information with the group!
• If someone mentions a resource that has been helpful for them or may be beneficial to share, be proactive and reiterate that information in the chat to everyone in case they’d like it as a resource. If need be, wait until the person sharing has stopped talking and send them a private message to clarify information or get urls
• If someone seems to be having trouble with audio or video that you notice, send a private message asking if there is anything that you can help troubleshoot
• Around the 10-minute mark, remind everyone that the chat is not saved so if there is any information that has been shared that they’d like to keep, it is a good time to write that down

After the meeting

• If you can, stay on with the facilitators after the participants have left – use this time to jot down or discuss anything that came up and address any suggestions or questions moving forward
• Pick a distant object to focus your eyes on, unclench your jaw, relax your shoulders, remove your tongue from the top of your mouth, shake out your wrists, acknowledge and release any other tension, and unplug! Go outside, pet a soft animal, doodle, do some jumping jacks, have a glass of whatever beverage you feel inclined to fill it with – something for you! You nailed it 😊
Appendix

- NAMI National Online Program Guide
- Implementation timeline template
- NAMI Coastal Virginia Breakdown of online platforms
- Additional Online Platforms
- Zoom Links and Information:
  - Tutorial on joining a zoom meeting: [https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting](https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting)
  - Zoom help center: [https://support.zoom.us/hc/en-us](https://support.zoom.us/hc/en-us)
  - Waiting Room
  - Zoom Latest Updates
  - From Zoom: [A message to our users](https://support.zoom.us/hc/en-us/articles/1200171351867-A-message-to-our-users)
  - From Forbes Magazine: [Use Zoom? Here are 7 Essential Steps You Can Take to Secure It](https://www.forbes.com/sites/forbstech/2020/04/29/use-zoom-here-are-7-essential-steps-you-can-take-to-secure-it/?sh=2903a716391f)
  - From the Electronic Frontier Foundation: [Harden Your Zoom Settings to Protect Your Privacy and Avoid Trolls](https://www.eff.org/deeplinks/2020/10/harden-your-zoom-settings-protect-your-privacy-and-avoid-trolls)
- NAMI NOVA created a quick guide on Zoom settings to help get you started on increasing security.
- NAMI NOVA Zoom facilitator training
- NAMI Virginia Privacy Policy
- Sample job description for tech support person.

Educational Course Resources:

- Google Evaluation Form for P2P
- Google Evaluation form for F2F
- Family-to-Family Adaptive Course Guide
- Peer-to-Peer Adaptive Course Guide
- NAMI Virginia Education Course Checklist (including education templates)

Support Group Resources:
  - Connection PPT slides
  - Family Support Group slides
  - NAMI NOVA support group script