



Guide for Offering NAMI Programs Online

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What Is This Guide's Purpose?

The Guide for Offering NAMI Programs Online was created in response to the growing interest in offering the traditional in-person NAMI programs via online platforms. Because the reach of in-person gatherings are often limited by distance, transportation, and busy schedules, NAMI State Organizations (NSO) and Affiliates (NA) have explored ways to offer NAMI programs online. The national education department created this guide to provide guidance and structure to NAMI field leaders as they transition their programs to online delivery.

How Do I Use This Guide?

Our intention is that any NAMI State Organization (NSO) or NAMI Affiliate (NA) will be able to use this guide, regardless of how much you can afford to spend on technology or how comfortable you feel using technology. Please note that NAMI does not currently endorse any online platform and that this guide provides information that NSOs and NAs can use when deciding which online platform is suitable for them.

This guide includes program-specific guidelines such as how to offer a NAMI support group online, how to offer a NAMI education program online, etc. No matter your comfort and knowledge level about online platforms, we ask that you read the program-specific guidelines carefully.

The information in the program-specific guidelines may seem repetitive. This is intentional; if a field leader reads guidance for only one program, they will still get the most important information.

Terms in this guide will be defined as they are used. The most common ones are:

Distance delivery: referring to any Internet technology used to convey information at a distance; i.e. not in-person

Online platform: a specially designed platform using Internet technology for teaching or learning purposes

Section 1: Getting to Know Different Distance Delivery Methods

When we think of the word “online,” how can we be sure we’re all thinking of the same thing? In this section, we will review five different delivery methods that can be used for groups of people (i.e. not one-on-one phone calls or texts). Before we begin reviewing these methods, it’s important to be aware that **the only distance delivery method recommended for the delivery of NAMI programs is through video conferencing.**

Email Distribution

Examples: Campaigner, Constant Contact, Mailchimp

Description: A single email, such as a newsletter, is sent to a group of people. The recipients are usually not able to respond to the email.

Pros: This method is best used if information needs to be sent out to a group quickly, such as the registration for a NAMI education class or important updates for your NSO/NA.

Cons: People are not able to respond to this message directly, so this method is not designed for continued conversation or instant feedback.

Discussion Forum/Blog

Examples: Blogger, SquareSpace, WordPress

Description: The owner of the blog posts something on the blog for others to read. People can respond by commenting on the blog entry. Some blogs have discussion forums, much like NAMI's Discussion Forums, which allow people to create their own topics and threads.

Pros: The comment section or discussion forum allows people to "talk" to each other. The owner of the blog can post things to keep the conversation on-topic, and all previous topics are kept in one place for people to refer to, unlike email distribution. This method is also inclusive for people who are deaf or hard of hearing or who have vision impairments, as they can use their browser to help them read the blog (e.g. text-to-speech software).

Cons: This method does not give instant feedback - days can go by before someone responds to a comment or post. It is also difficult to moderate (i.e. watch for inappropriate conversations/comments/threads) and people may become abusive if there isn't at least daily moderation.

Group Texts

Examples: Any mobile text app, including Facebook Messenger, Telegram, WhatsApp

Description: People text to each other using a common mobile text app and support each other via group text.

Pros: This method provides close-to-live feedback, in that people can instantly respond to texts. It is also inclusive of people who are deaf or hard of hearing or who have vision impairments.

Cons: Group texts are extremely difficult to moderate, as there's no good way to remove someone who becomes abusive or monopolizing. To leave the group chat, it may require people to block every phone number on the group chat. For most mobile text apps, a phone number is tied to the texter, which means that people could get unsolicited or unwanted

private texts or phone calls. People may also get texts at inappropriate times as group texts can be difficult to lock/close.

Phone Conferencing

Examples: GoToMeeting, Skype, UberConference

Description: A group of people dial in to a shared phone conference line and speak to each other.

Pros: This method provides live feedback, much like a regular phone call. It is also inclusive of people who have vision impairments.

Cons: Phone conferencing is very difficult to moderate because, depending on the phone conferencing line, you are not always able to “kick out” or remove a caller. It is easy for people to speak over each other because of the lack of other feedback, like body language. It is difficult to share resources, like looking at a common document, unless this is prepared in advance.

Video Conferencing

The only distance delivery method recommended for the delivery of NAMI programs

Examples: Adobe Connect, Amazon Chime, Facebook Live, Google Hangouts, GoToMeeting, Microsoft Teams, Skype, Zoom

Description: A group of people enter a video conferencing call via a link, using a computer or tablet. People can use web cameras to see each other and can speak directly.

Pros: The host of the video conferencing call has the most control over the call and can enable/disable settings for the room (e.g. mute lines, disable recording, remove abusive attendees). This method gives live feedback and allows people to see each other. Resources can also be viewed by screen-sharing, which is when the host shares their screen with the attendees, so everyone sees the same thing simultaneously such as a PowerPoint, a video, or other file.

Cons: If poorly hosted, this method can easily become a very poor experience for attendees. A lot of time needs to be spent learning the video conferencing platform before using it. Not all video conferencing technology is equal in functionality and security, so it is essential to investigate and test these platforms to find the best fit. Once a platform is chosen, settings and functionality should be adapted to include people that are deaf or hard of hearing and people with vision impairments.

Section 2: How Do NAMI Programs Change When Offered Online?

Transitioning an in-person experience to an online platform in a quality way is not a simple process. Being online presents unique challenges to program delivery and attendee management. We will go into greater detail about these challenges in the program-specific guidelines, but there are some things that are true for all online program management.

The audience is everyone

In an in-person NAMI class, support group, or presentation, there are certain expectations you may have about the audience: it'll be limited to people in your community and/or to people who received the invite. For an online program, the audience is unlimited – anyone who has the link, conference code, or other means of entry can enter, regardless of time zone or geographical location. While this makes online programming more inclusive and opens it up to exciting possibilities, it also means that attendance can quickly get too large to handle. In the program-specific guidelines, we will go over how to control attendance via registration.

Having an unlimited audience means that sometimes people attend who shouldn't. An obviously unwelcome attendee is the "online troll," which is a term used to refer to people who enter online communities with the sole intention to provoke and harass the community; an example for NAMI programming would be someone who enters a NAMI support group to make negative comments about mental health conditions to see if they can start an argument and distract the support group process. Although this can certainly happen in an in-person support group, the wide reach of online delivery increases the likelihood of an online troll entering your NAMI program if there aren't protections put into place before the program starts. We go over these protections in detail in the program-specific guidance.

It's possible that people from outside your local community will want to join your NAMI program. There are two things to consider when allowing this: usefulness of provided resources and emergency response. If the resources you give during your program are localized, they will not be of use to participants from outside your community. Emergency response also becomes difficult with an out-of-state/county attendee unless you gather emergency contact information in advance.

In the program-specific guidelines, you'll find more information on how to control your attendance to protect your attendees.

The exit door is anonymous

If someone in an in-person NAMI program gets up and leaves the room without saying anything, the program leaders may follow them to make sure they are safe. In an online program, people can simply disconnect from the meeting and disappear. Unless you collected information about the attendee in advance, there is no way to find this person afterwards. This can be difficult for program leaders to handle, so it is important to talk about this possibility in

advance and prepare for it. We have provided guidance on how to do this in the program-specific guidelines.

The feedback is limited

Effective program leaders have learned to "read" their participants, whether it's evaluating the mood of an audience during a presentation, detecting distress during a support group, or noticing a student's question during a class. This skill is especially challenged during online delivery; even with all web cameras turned on, it can be difficult to pay attention to each attendee. Therefore, it is important to have not just your co-leader with you in the online platform, but also someone to monitor technology needs and the chat function. What you may miss on the web camera, your team member can catch in the chat.

In the program-specific guidelines, you'll find more information on how to be an effective program leader when delivering your program online.

Every footprint is collected

One of the most important things to realize about online programming is that there is no such thing as a 100% guarantee of confidentiality or privacy. Although this is also true for an in-person meeting, it is important that attendees understand this; some attendees may feel that just because they are in their private home, things will be private. Please read your online platform's data collection and privacy policy so you can communicate it with your attendees.

It is important to understand that every action taken online is captured somewhere, whether it's signing a registration form, creating an account, or clicking a link. This may sound overly cautious, but it's important for both field leaders and participants to be clear about the assumption of risk they are taking when they move to online platforms.

There are many ways you can increase the privacy and confidentiality of your program attendees, most of which include setting up the online platform before the program starts. Please refer to the program-specific guidelines for more information on what to look for when setting up your platform.

Section 3: Online Requirements Across All NAMI Programs

While delivering NAMI programs online, please remember that you are still required to follow the most recent version of the **NAMI National Education Programs Operating Policies**. The Guide for Offering NAMI Programs Online is a "living document" and will therefore be updated to address the most frequently asked questions. We have elaborated on several commonly mentioned topics below.

HIPAA compliance

NAMI programs are not required to adhere to HIPAA as NAMI programs are not mental health services. Since we are not offering professional clinical services, it is unnecessary for NSOs and NAs to look for HIPAA-compliant platforms as you're transitioning programming to distance delivery methods.

However, as stated in our 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 (more information found in program-specific guidelines).

Exceptions may occur if a NAMI State Organization (NSO) or NAMI Affiliate (NA) receives funding from a source that requires HIPAA compliance. If your NSO or NA has a county, state or federal contract with a BAA (Business Associate Agreement), they must abide by the regulations outlined within.

Mandated reporting

A mandated reporter is required to act whether they are meeting in-person or virtually. The mandated reporter may be a NAMI program leader or a participant in a program.

Offering programs virtually means that the mandated reporter may not know which county or locality should receive a report of danger, abuse or neglect. We recommend that leaders gather emergency contact information from all participants in programs whether offered in-person or online. In an online setting, it would be nearly impossible to reach the appropriate 911-dispatcher or crisis services without emergency contact information. Collecting emergency contact information from attendees can be done by requiring them to register before attending; this will be covered in the program-specific guidelines.

Attendee/participant eligibility

As with in-person NAMI programs, online programs must follow the most recent version of the NAMI National Education Programs Operating Policies. Please refer to the policies when determining attendee/participant eligibility.

No observers/recordings

Under no circumstances are NAMI State Organizations and Affiliates allowed to record online NAMI programs. Observers (i.e. people without the necessary lived experience and/or are attending only to observe and not participate) are not allowed in any online NAMI program. If someone attends as an observer, they should be kindly redirected and removed from the online platform.


Reporting NAMI programs that were hosted online

Please continue to report your programs on NAMI 360 as you would an in-person program. When you create a data report for the program hosted online, please select Online in the Delivery Method field.


New Program Data Reporting: NAMI Basics

Information

* Program Listing

 NAMI Basics Test ×

* End Date i




* # People Starting the Class i

* # Veterans, Active Duty or Related i

* # People Finishing the Class i

* Delivery Method i



By selecting Online in the Delivery Method field, you will be able to sort your program data report (available to you in NAMI 360) by this category to see how many programs you offered online during this time.

Section 4: Introduction to Program-Specific Guidance

The rest of the Guide for Offering NAMI Programs Online is dedicated to showing you how to deliver different NAMI programs in a safe and effective way. Thank you very much for your dedication to providing a quality experience for people impacted by mental health conditions.



Online Guidelines: NAMI Classes

People attend NAMI classes to learn more about how to live well with a mental health condition, either their own or their loved one's condition. It is often one of the few places (or the first place) people feel comfortable speaking about their lived experiences, and many people who attend these classes become strong advocates for themselves and others. When delivering NAMI classes online, we owe it to our participants to provide a quality online experience.

A quality online experience means that NAMI class participants:

- Feel that they have learned and grown as a result of the class
- Meet people with shared lived experience in a nonjudgmental and supportive setting
- Are not distracted by technical errors or ineffective moderation
- Are protected from heckling, insults, or online trolling
- Can rely on the hosting NAMI State Organization or Affiliate to honor their privacy and confidentiality
- Are supported in a mental or physical health emergency
- Feel better, not worse, after attending the class

Please read these guidelines as you prepare to offer NAMI classes online.

Before the Class Starts

This guidance is written for NAMI State Organization or Affiliate staff; when possible, this work should be done by the program director or coordinator.

Gather Your Team

Your online class team should consist of two trained NAMI teachers and one producer.

The two teachers should decide in advance who will teach each section, much like an in-person class. The two teachers should have a way to communicate privately if necessary, such as a host-only private chat or through texting on each other's private phones. This is essential if one of the teachers loses their Internet connection.

The person who supports the technological aspects of the online class is called the producer. They do not need to be a trained NAMI program leader. A producer is someone who knows how to use the online platform well. Their duties include but are not limited to:

- Setting up the platform beforehand
- Muting audio lines and turning off cameras
- Removing online trolls from the platform
- Alerting teachers to things happening in the text chat
- Helping participants learn how to use the different platform functions
- Helping teachers and participants handle technical issues as they emerge

Teachers and producers should read through these guidelines, especially the *During the Class* section.

Choose and Set Up the Platform

Choosing an online platform and configuring its security settings is one of the most important things you can do to keep your online NAMI programs safe and secure. The settings we recommend will help you offer a quality experience to your participants.

To offer NAMI classes online effectively, the online platform you use must have certain functions. At minimum, the online platform you choose must have:

- **Feedback tools:** buttons participants can press to “raise their hands,” indicate agreement or disagreement, and signal that they are away from the computer.
- **A chat function:** a section where participants can type comments to each other and teachers to participate.

As stated before, there should be a producer, or someone who is familiar with the online platform. Each online platform has different functions and settings, all of which should be set up before the NAMI class begins by the producer. Settings that we recommend are:

- **Audio only:** are you allowing participants to connect using only their phone line?
 - Keep in mind that this limits their ability to participate, such as seeing the chat or others’ feedback icons. They will also be unable to see anything you are sharing in the room, such as videos, PowerPoints, or other documents.
- **Webcams:** disable webcams at first to give people the choice to turn them on
- **Screen and file sharing:** disable participants’ ability to share their screens or files
- **Recording:** disable participants’ ability to record the screen/video
 - Keep in mind that this does not disable basic screen capture (i.e. taking a picture of the screen), which is available on any electronic device. Participants should know this before deciding to turn on their web cameras.
- **Chat privacy:** if possible, disable participants’ ability to download the chat history (i.e. “record the text chat”).

- **One-on-one chat:** disable participants' ability to chat privately with each other
 - The teachers and producer will need this ability in emergencies and each platform has a different way to do this. Adobe Connect, for example, has host-only private chatting, where only the host can have one-on-one conversations. Zoom uses breakout rooms, where hosts (teachers/producer) can bring a participant into a breakout room.
- **Set up a “waiting room” or “landing page”:** this page will display important information before the class starts
 - Some online platforms, like Zoom and Adobe Connect, have the function of displaying a PowerPoint or message in the video conferencing platform, which participants can read before the class begins. This message can explain when the class is going to start, tech requirements (such as headphones), and other pertinent information.

It is encouraged to limit participants' permissions as much as possible. Trying to set up the platform while the NAMI class is in session is highly discouraged.

Teachers and producers are encouraged to have practice sessions with the online platform before delivering their first class; this will help them to become more comfortable with the technology.

Advertise Appropriately

How you advertise your NAMI class will determine:

- **What people know about the class** in advance; e.g. do they know the teachers are peers, not professionals? Do they know about the lived experience requirement?
- **Who will be able to access the online class;** e.g. an unprotected link will allow anyone with the link to enter the class; requiring registration to receive the link can prevent this (see sub-section *Register Your Participants*).
- **How people will behave in the class;** e.g. will they understand how to use the platform, will they know they can be removed/redirected for inappropriate behavior?

Advertising appropriately in the beginning prevents confusion and disappointment in the future.

Require Participants to Register

For NAMI classes, it is mandatory to require participants to register. Registering participants means collecting some information from them before they are given the link to join. You will want to collect their name and email address (to send them the evaluation later, if necessary). By identifying your participants, you will be better able to manage them should they need to be removed from the class (e.g. for being an online troll) and you will be able to communicate with them throughout the class weeks (see sub-section *Communicating With Participants*). You'll

also be able to control the number of people who attend. Please refer to the class size guidelines in your leader manual when registering participants.

Depending on your capacity, you may choose several ways to register your participants:

- Use a monitored Google Form
- Asking prospective participants to email a staff person and capturing the information on an Excel spreadsheet or other roster
- Use a built-in form through the online platform (not available to all platforms) - be mindful that by doing it this way, the online platform also has the registrant's data

Remember to give out the link to the class only to registrants and ask them not to share it. Zoom has a helpful function: "the waiting room." Participants enter the waiting room and must wait for someone with host access (the teachers or the producer) to move them into the actual NAMI class. This is a good way to control attendance and keep out trolls who try to re-enter.

During registration, you should also collect emergency contact information; at minimum, you should collect their emergency contact's name and phone number.

Understand Data Collection and Privacy

Lastly, be aware of your online platform's data collection and privacy policy. These policies explain how a user's data is collected, stored, and used. Encourage your participants to read it before attending the NAMI class.

Most policies are not easy to understand so additional messaging is appreciated. As with all online experiences, confidentiality and privacy cannot be 100% assured; we encourage you to draft messaging asserting that and adding the things that your organization is doing to protect confidentiality and privacy (see suggestions in the sub-section *Choose and Set Up Your Platform*).

Here are some important things to keep in mind:

- Online platforms that require the participant to create an account will have more information on the participant than those that don't.
 - Good examples are Google Hangouts or Facebook Live: these online platforms connect directly to the participant's existing Google or Facebook account, which means that some information linked to that account may be accessed during the NAMI class. Therefore, these platforms are not recommended.
- Striking the balance between anonymity/privacy and safety can be difficult. Consider what information you absolutely need to have about the participant to keep them and the audience safe.
 - Some people may not want to use their real name. This is acceptable as long as they do show up with a name and can be called on during the class. Someone

showing up just as a phone number or email address is not acceptable because they cannot be called on and will be difficult to track.

- Trolls, or people who attend just to heckle and insult, thrive on anonymity. If you are leaning towards anonymity in your class, you must have a way to kick out trolls permanently.

This sounds like a lot of work at the beginning, but your participants will thank you for it.

During the Class

This guidance is written for NAMI teachers: all teachers should read this PRIOR to their online NAMI class.

Communicating with Participants

Offering your NAMI class online means that the way you communicate with your participants will change. Two things will have to adapt: the way you distribute the manual and the small talk that may happen before NAMI classes.

Distributing the manual

- Electronic versions of the participant manuals can be found in the NAMI store; once downloaded, these can be distributed to participants.
 - The class manuals “cut” into separate PDFs (to re-create the in-person rule of handing out only one section of the manual before each class) are available on the program-specific NAMInet leader pages.
- You should email the PDF of the manual or manual section to your participants before each class, with instructions that they will be referring to this PDF throughout.
- If appropriate, you may ask participants to re-register each week to get a headcount for that week’s class, as well as distribute the next sections of the manual.

“Small talk” with participants

- Teachers should “open the room” 30 minutes before class time to ensure that the online platform is working.
- Participants should be encouraged to enter the room 15 minutes before class begins.
 - These 15 minutes are used not only to get participants familiar with the platform, but to have small talk. Tell participants that the class time will be spent on the class material, but that the time before class can be used to discuss other things (e.g. current events, news, personal updates, etc.).
- It is at the teachers’ discretion whether they’d like to keep the breaks in the agenda. If so, this can also be a time for participants to speak to each other about things unrelated to the course material.

- Should teachers decide to get rid of breaks, they should communicate that participants are free to step away any time they wish but should indicate their absence using a feedback tool icon.

By utilizing the “small talk” time well, teachers ensure that the NAMI class time is spent on course material.

Modifying Behavior for Online Teaching

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

- **Turn on your webcam.** While this may be optional for participants, 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!).
- **Limit distractions.** Make sure you are teaching in a quiet and private place where you will not be bothered.
- **Be mindful of audio quality.** Use a headset with a microphone if possible. Limit background noise or other things that would distract from your class.
- **Be aware of your 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.
- **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 participants may also be unaware of how or when to respond. They may be thinking of what to say or it may take time to type a reply in chat. Allow for moments of silence longer than you usually offer and remind participants about how they can participate (e.g. using feedback tools, speaking).
- **Pay attention to the chat.** In your team of three, someone should always be watching the chat, as participants often respond by typing there instead of speaking out loud. You may want to remind participants to use the chat for technology concerns (e.g. “I can’t hear audio” or “can you define what that term means?”) or quick yes/no replies. Encourage people to speak whenever possible. Great conversations can happen on the chat, so paying attention to it is doubly important to ensure you are including all participants.
- **Be engaging.** Remember the context: you and your participants 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, as many of your participants may be wearing headphones.

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 glitches happen, it's common to feel irritated, anxious, or flustered. When you find yourself in this situation, here are some things to remember:

- **Rely on your team to address the technological concern.** Your producer will handle the technological side of the issue, while you and your co-teacher should be communicating with your participants (e.g. "We're experiencing tech challenges and we want you to know that a member of our team is addressing it. Thanks for 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 participants 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 class, then you've probably done everything you could within your locus of control. Be kind to yourself, especially when things are not going smoothly.

Handling Online Trolls and Disruptive Participants

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 provocative comments, insult people, and cause general chaos.

When a troll has been identified, they should be immediately removed from the group. Do not argue or engage with them.

The teacher should acknowledge what has happened and help the group process and move on.

- Example script: "Hi everyone, I know what just happened was unpleasant. We've banned the individual from re-entering the room; if they re-enter, we'll ban them again. We ask that you ignore them and leave it to our team to handle them. I appreciate everyone's understanding."

Thankfully, if you have done your due diligence with registration, an online troll is not likely to disrupt the group.

Like an in-person class, it is possible for participants to become abusive towards one another. The abuse may be intentional or unintentional; regardless, teachers are expected to address this as they would in an in-person class, which is to redirect the individual. They should remind everyone that the NAMI class strives to be a safe and nonjudgmental place. If the teacher

deems it necessary, the offending participant and the teachers can debrief one-on-one after the class, via phone or video conference.

Responding to Emergencies

If the participant is at the point where it may be appropriate to call 911, one teacher should pull the participant 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 teacher should ask the participant if they can call them, and then continue the debrief over the phone.

During this one-on-one session, the teacher should tell the participant that they are also going to call the participant's emergency contact person so that the participant can be redirected to crisis services (the producer can do this in the meantime). The teacher should stay with the participant until the emergency contact has been reached and is with the participant, or until the participant 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 participant'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 teacher should stay with the participant until the crisis team arrives.

If a participant makes a comment that indicates they are a danger to themselves or others and then abruptly logs off, one teacher should immediately contact that person's emergency contact to explain the situation.

While one teacher is handling the emergency, the other teacher should explain what is happening to the other participants (e.g. "My co-teacher 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.

Program-Specific Adaptations

Because NAMI classes are filled with activities, this section is not all inclusive. As a reminder, the Guide for Offering NAMI Programs Online is a "living document," which means that the national education department will be revising it as we communicate and troubleshoot with the field. Below are suggestions for how to adapt certain kinds of activities to online delivery.

At the end of the program-specific guidance on NAMI classes, we have provided a detailed addendum explaining specific adaptations for certain activities. Please refer to this prior to starting a NAMI class session.

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:

- Screenshot the video using audio
- Screenshot 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 re-create the visual impact of this activity.

After the Class

This guidance is written for NAMI leaders, producers and state/affiliate staff.

Debriefing and Strategizing

We encourage everyone – the teachers, the producer, the state/affiliate staff – to debrief after an online class. This allows you to address concerns, improve, and celebrate your achievements together. When debriefing, here are some guiding questions:

- What went well? Why did it go well?
- What could be improved? What support is needed to make these improvements?
- Did the online platform serve all our needs? If not, are we open to trying a new one?
- How did this feel different from and/or like an in-person class?

We also ask that you report the data from your NAMI class, so we know how many classes are offered online; see the *Introduction* of this guide for instructions.

If after debriefing you feel that you'd like to seek support for an issue or report a celebration and/or concern, please contact namieducation@nami.org to be referred to the appropriate NAMI program manager.

If you are interested in offering Spanish-language classes, contact namieducation@nami.org so we can help you with this process.

Practicing Self-Care

It can be very tiring to lead a NAMI class – doing it online is an added challenge. Please take time to practice self-care. We offer you these final reflections so that you can be assured that your service to NAMI and your community is invaluable:

- An online community is much larger than an in-person one. You've met and impacted people you may have never come across otherwise.
- You created a sense of belonging and safety even without the benefit of a physically gathered community.
- You did your best, and NAMI is grateful to you for it. Thank you.



NAMI Basics: Adapting Activities for Online Platforms

General guidelines:

- If you opt to provide a break during class, shorten it to 5 minutes and start promptly when the break is over.
- Remind participants how to use the feedback tools (raise hand, etc.) at the beginning of each class – they are helpful during activities, when people have questions or when they need to update their status (agree, disagree, step away from the meeting, etc.).
- You may want to show pages from the participant manual on screen during each class using the screen share feature.
- Remind participants not to work ahead. You'll be working on each week's material together.
- If there are audio delays, read the materials rather than asking for participants to volunteer.
- Where the teacher manual calls for discussion, allow participants to share responses using audio and video, just audio or chat.

Class 1

Introductions (1.6): Introductions can be done using video or just audio. If someone doesn't have audio capability, they can type their introduction in the chat.

Urgent issues (1.6): Do the activity using the chat feature with the leader tracking the list. Leaders may use a "white board" to take notes that are shared with the group if the online platform has that feature. Keep the list for Class 6.

Class 2

Videos: Audio delays may make showing videos difficult. We suggest you use the versions with closed captioning. If you are unable to show videos, follow the lecture as written. There is a supplemental participant handout that contains images from the videos.

Class 3

Sharing stories (3.1): Teachers should have their cameras on during stories so that they can manage the time using a visual cue like timekeeping cards or hand signals. You can

invite participants to turn on their cameras for this activity as well but that may not be possible due to limited bandwidth or equipment. If a participant has no audio, they may type their story in the chat and one of the teachers can read it aloud to the group.

Videos: See guidance offered in Class 2.

Class 4

I-statements and you-statements (4.5): To avoid audio delays, the teachers will demonstrate the I-statement and you-statement examples using pages 4.c – 4.d of the teacher notes section or the green cards. One teacher will be the *Family Member* and the other will be the *Youth*. Once both examples have been read, proceed to the discussion with the participants.

Reflective responses (4.7): To avoid audio delays, select Option 2 on page 4.8 with a teacher reading the sample outbursts on pages 4.e – 4.i of the teacher notes or the yellow cards. Have people offer suggestions by typing in chat. You may share the sample responses found on pages 4.e – 4.i or the yellow cards once participants have finished sharing examples.

Problem Solving (5.22): To avoid audio delays, the teachers will demonstrate the Collaborative Problems Solving examples using pages 4.j – 4.k of the teacher notes section or the blue card. One teacher will be the *Family Member* and the other will be the *Service Member*. Once the example has been read, proceed to the discussion with the participants.

Class 5

No adaptation required for this class.

Class 6

Guest speaker (6.1): Use the guidelines (pages TN.8 and 6.a) to find a guest speaker for Class 6. Invite them to join class at the beginning. If possible, have the presenter turn on their camera. If a presenter from the community cancels, invite an affiliate leader to talk about resources. Questions can be handled with chat or by having people raise their hand using the feedback tool before speaking.

Evaluations (CF.12): Share the affiliate mailing address so participants may submit anonymous feedback.

Certificates: Once you decide whether certificates will be emailed or mailed, request participants' email and/or home addresses.

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

General guidelines:

- Use the F2F PowerPoint slide decks which are on NAMINet (formerly the Extranet). The slides will guide participants during discussions and activities.
- If you opt to provide a break during class, shorten it to 5 minutes and start promptly when the break is over.
- Remind participants how to use the feedback tools (raise hand, etc.) at the beginning of each class – they are helpful during activities, when people have questions or when they need to update their status (agree, disagree, step away from the meeting, etc.).
- Remind participants not to work ahead. You'll be working on each week's material together.
- If there are audio delays, read the materials rather than asking for participants to volunteer.
- Where the teacher manual calls for discussion, allow participants to share responses using audio and video, just audio or chat.

Class 1

Introductions (1.8): Introductions can be done using video or just audio. If someone doesn't have audio capability, they can type their introduction in the chat.

Urgent concerns (1.9): Do the activity using the chat feature.

Injury vs. cancer (1.11): Do the activity using the chat feature.

Class 2

Videos: Audio delays may make showing videos difficult. We suggest you use the versions with closed captioning. The script of each video is included in the leader manual so you may choose to show the video on mute and read the script to the class. If you are unable to show videos, you may read the script and the participants can follow the lecture using the pages in their workbooks. The participant workbook pages contain images from the videos.

Class 3

What do we have in common? (3.8): Use the feedback tools (raised hand, etc.) feature to do this exercise. Teacher will need to track the number of people that respond to

each category. Example: “It looks like 7 of you have a loved one that is sensitive to noise.” You may also use the chat feature if needed but that may take more time.

Sharing stories (3.11): Teachers should have their cameras on during stories so that they can manage the time using a visual cue like the timekeeping cards (pages 3.d – 3.f) or hand signals. You can invite participants to turn on their cameras for this activity as well but that may not be possible due to limited bandwidth or equipment. If a participant has no audio, they may type their story in the chat and one of the teachers can read it aloud to the group.

Class 4

No adaptation required for this class.

Class 5

Videos: See guidance offered in Class 2.

Class 6

I-statements and you-statements: To avoid audio delays, the teachers will demonstrate the I-statement and you-statement examples using pages 6.c – 6.f of the leader preparation section or the blue cards. One teacher will be the *Family Member* and the other will be the *Person with Symptoms*. Once both examples have been read, proceed to the discussion with the participants.

Reflective responses (6.6): Have people offer suggestions by typing in chat.

Class 7

Empathy activity (voices): One teacher will conduct the drawing activity as written, while the second teacher reads the different voices (using pages 7.c – 7.l of the leader preparation section or the blue cards) repeating the examples until it’s time to stop. Lead the participant discussion as written, skipping only the question at the top of page 7.5. Use audio or the chat feature for the discussion.

Guest speaker (7.18): Use the guidelines (pages GP.14 and 5.c) to find a guest speaker for Class 7. Invite them to join class about an hour into the class, during the break so they are ready to present. If possible, have the presenter turn on their camera. You may use several of the video testimonials with people in recovery if a presenter is not available. Questions can be handled with chat or by having people raise their hand using the feedback tool before speaking.

Class 8

Family role activity: If there is a breakout room feature in the online platform, the activity can be run as it is written. Instead of using flip chart paper, each group will need to select someone to take notes and share them with the class. If there is no breakout room option, teachers may run the activity with the entire group. Be sure to get the perspectives of the different relative groups (parents, siblings, spouses, children, etc.). Without breakout rooms it may not take the entire 35 minutes.

Evaluations (8.23): Share the affiliate mailing address so participants may submit anonymous feedback.

Certificates: Once you decide whether certificates will be emailed or mailed, request participants' email and/or home addresses.



NAMI Homefront: Adapting Activities for Online Platforms

General guidelines:

- If you opt to provide a break during class, shorten it to 5 minutes and start promptly when the break is over.
- Remind participants how to use the feedback tools (raise hand, etc.) at the beginning of each class – they are helpful during activities, when people have questions or when they need to update their status (agree, disagree, step away from the meeting, etc.).
- You may want to show pages from the participant manual on screen during each class using the screen share feature.
- Remind participants not to work ahead. You'll be working on each week's material together.
- If there are audio delays, read the materials rather than asking for participants to volunteer.
- Where the teacher manual calls for discussion, allow participants to share responses using audio and video, just audio or chat.

Class 1

Introductions (1.7): Introductions can be done using video or just audio. If someone doesn't have audio capability, they can type their introduction in the chat.

Pressing issues (1.7): Do the activity using the chat feature with the leader tracking the list. Leaders may use a "white board" to take notes that are shared with the group if the online platform has that feature. Keep the list for use Class 6.

Class 2

Videos: Audio delays may make showing videos difficult. We suggest you use the versions with closed captioning. If you are unable to show videos, follow the lecture as written. There is a supplemental participant handout that contains images from the videos.

Sharing stories (2.15): Teachers should have their cameras on during stories so that they can manage the time using a visual cue like the timekeeping cards (pages 3.d – 3.f) or hand signals. You can invite participants to turn on their cameras for this activity as well but that may not be possible due to limited bandwidth or equipment. If a participant has no audio, they may type their story in the chat and one of the teachers can read it aloud to the group.

Class 3

No adaptation required for this class.

Class 4

Videos: See guidance offered in Class 2.

Class 5

Empathy activity (voices): One teacher will conduct the drawing activity as written, while the second teacher reads the different voices (using pages 5.c – 5.d of the teacher notes section or the green cards) repeating the examples until it's time to stop. Lead the participant discussion on page 5.5 as written, skipping only the third question. Use audio or the chat feature for the discussion.

I-statements and you-statements: To avoid audio delays, the teachers will demonstrate the I-statement and you-statement examples using pages 5.e – 5.f of the teacher notes section or the green cards (the scripts are also in the teacher boxes on 5.14 – 5.15). One teacher will be the *Family Member* and the other will be the *Service Member*. Once both examples have been read, proceed to the discussion with the participants.

Reflective responses (5.19): Have people offer suggestions by typing in chat.

Problem solving (5.22): To avoid audio delays, the teachers will demonstrate the Collaborative Problems Solving examples using pages 5.g of the teacher notes section or the green cards. One teacher will be the *Family Member* and the other will be the *Service Member*. Once both examples have been read, proceed to the discussion with the participants.

Class 6

Videos: See guidance offered in Class 2.

This Emotional Life video (6.7 – 6.8): If you are unable to show videos, you will skip this activity, or you can lead a discussion about the stress of homecomings and transitioning out of the military experienced by families.

Evaluations (6.20): Share the affiliate mailing address so participants may submit anonymous feedback.

Certificates: Once you decide whether certificates will be emailed or mailed, request participants' email and/or home addresses.

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

General guidelines:

- If you opt to provide a break during class, shorten it to 5 minutes and start promptly when the break is over.
- Remind participants how to use the feedback tools (raise hand, etc.) at the beginning of each class – they are helpful during activities, when people have questions or when they need to update their status (agree, disagree, step away from the meeting, etc.).
- You may choose to share images of the participant workbook on screen during each class.
- Remind participants not to work ahead. You'll be working on each week's material together.
- If there are audio delays, read the materials rather than asking for participants to volunteer.
- Where the leader guide calls for discussion, allow participants to share responses using either audio and video, audio, or chat.

Class 1

Introductions (1.3): Introductions can be done using video or just audio. If someone doesn't have audio capability, they can type their introduction in the chat.

Class guidelines (1.3): Do the activity using the chat feature with the leader tracking the list. Leaders may use a "white board" to take notes that are shared with the group if the online platform has that feature.

Language (1.4): This activity can be divided into two separate brainstorms using the chat feature. To start, attendees should type in the negative words and phrases they associate with mental health. Then, they should type in the positive words and phrases. Once you've completed these two brainstorms, lead a 5-min discussion as directed.

Videos: Audio delays may make showing videos difficult. We suggest you use the versions with closed captioning. The script of each video is included in the leader manual so you may choose to show the video on mute and read the script to the class. If you are unable to show videos, you may read the script and the participants can follow the lecture using the pages in their workbooks. The participant workbook pages contain images from the videos.

Vision statement (1.11): Use the chat function for a group brainstorm of possible vision statements. Leaders should use this list for the activity that follows by asking attendees to indicate if they share the vision being read out loud from the list. Attendees can indicate this verbally, in chat, or by using the “raise hand” icon (if there is one).

Class 2

Videos: See guidance offered in Class 1.

Group brainstorms: Use a combination of chat and audio/video feedback.

Where a show of hands is required: Use the chat function or feedback tool if available.

Wrap up (2.15): When you remind participants that they will be sharing stories next week. If they choose, they can type up their story in advance so that if audio isn’t working, participants can paste their story in the chat.

Class 3

Goals check in (3.1): If the leaders don’t use breakout rooms, this activity can be done as a large group check-in using audio and/or chat.

Videos: See guidance offered in Class 1.

Where a show of hands is required: Use the chat function or feedback tool if available.

Quiz (3.4): When asking for answers to quiz questions, take one response per question rather than having multiple people respond verbally or in the chat.

Experiences of diagnosis (3.6): Use the feedback tools or chat for this activity. If using chat, leaders should read each statement out loud and participants should type “yes” in the chat box if they feel the statement relates to them.

Sharing stories (3.7): Leaders should have their cameras on during stories so that they can manage the time using a visual cue like timekeeping cards or hand signals. You can invite participants to turn on their cameras for this activity as well, but that may not be possible due to limited bandwidth or equipment. If a participant has no audio, they may type their story in the chat (or paste it in if they had it prepared in advance) and one of the teachers can read it aloud to the group.

Class 4

Where a show of hands is required: Use the chat function or feedback tool if available.

Goals check in (4.1): If the leaders don’t use breakout rooms, this activity can be done as a large group using audio or chat.

Using I-statements (4.8): To avoid audio delays, do this activity as a large group. Explain that since you'll be practicing as a group and online, eye contact won't be included as part of the practice.

- Ask each participant to type a sample I-statement in the chat. This should be a statement relevant to a situation in their life right now.
- A leader will read the first sample aloud and ask participants whether the statement would cause them to feel defensive or receptive by using the feedback tool or chat.
- The second leader will respond as coach, offering gentle correction/guidance as needed.
- Repeat process with each example shared until you reach the end of the list

Class 5

Group brainstorms: Use a combination of chat and audio/video feedback.

Where a show of hands is required: Use the chat function or feedback tool if available.

Goals check in (5.1): If the leaders don't use breakout rooms, this activity can be done as a large group using audio or chat.

Guest speaker (5.6): Use the guidelines (pages GP.9 and 5.c) to find a guest speaker for Class 5. Invite them to join class about an hour into the class, during the break so they are ready to present. If possible, have the presenter turn on their camera. You may use one of the family member video testimonials if a presenter is not available. Questions can be handled with chat or by having people raise their hand using the feedback tool before speaking.

Videos: See guidance offered in Class 1.

Class 6

Group brainstorms: Use a combination of chat and audio/video feedback.

Goals check in (6.1): If the leaders don't use breakout rooms, this activity can be done as a large group using audio and/or chat.

Treatment option trivia (6.3): Do this activity as a large group. Leaders read questions out loud and have the participants use chat to provide answers. Don't keep score.

Videos: See guidance offered in Class 1.

SMART Goals pairs activity (6.15): If the leaders don't use breakout rooms, this activity can be done as a large group using audio and/or chat. The leaders will only be able to cover some examples in this case and should select examples from participants that they would like some help with the activity.

Class 7

Goals check in (7.1): If the leaders don't use breakout rooms, this activity can be done as a large group using audio or chat.

Strengths pairs activity (7.4): Have each person share their top two strengths in chat. Leaders read each person's strengths from the chat out loud, adding one they have observed about that participant. Once everyone's strengths have been shared, proceed to the five-minute discussions.

Rethinking a story (7.7): If the leader doesn't use breakout rooms, they should ask for two volunteers to do this activity with the full group. The participants chosen would ideally be able to share their story verbally rather than typing in the chat. Other participants listening can contribute at the end by sharing positive feedback/strengths they notice about the volunteer's story in the chat.

Class 8

Goals check in (8.1): If the leaders don't use breakout rooms, this activity can be done as a large group using audio or chat.

Reverse brainstorming activity (8.4): This activity can be done as a large group, if breakout rooms aren't an option.

Evaluations (worksheet 7): Share the affiliate mailing address so participants may submit anonymous feedback.

Certificates: Once you decide whether certificates will be emailed or mailed, request participants' email and/or home addresses.



NAMI Provider: Adapting Activities for Online Platforms

It's unlikely that a healthcare organization will be interested in a NAMI Provider course being delivered through an online platform. If your NAMI State Organization or NAMI Affiliate receives such a request, please email namieducation@nami.org for guidance.



Online Guidelines: NAMI Presentations

NAMI presentations bring people together to listen and learn about the lived experience of people with mental health conditions and their loved ones. It creates places of nonjudgment, empathy, and growth. When delivering NAMI presentations online, we owe it to our attendees to provide a quality online experience.

A quality online experience means that NAMI presentation attendees:

- Feel that they have learned and grown as a result of the presentation
- Are not distracted by technical errors or ineffective moderation
- Are protected from heckling, insults, or online trolling
- Feel better, not worse, after attending the presentation

Please read these guidelines as you prepare to offer NAMI presentations online.

Before the Presentation Starts

This guidance is written for NAMI State Organization or Affiliate staff; when possible, this work should be done by the program director or coordinator.

Gather Your Team

Your online presentation team should consist of two trained NAMI presenters and one producer.

The two presenters should decide beforehand who will be the primary presenter and who will be the secondary presenter, much like an in-person presentation. The two presenters should have a way to communicate privately if necessary, such as a host-only private chat or through texting on each other's private phones. This is essential if one of the presenters loses their Internet connection.

The person who supports the technological aspects of the online class is called the producer. They do not need to be a trained NAMI program leader. A producer is someone who knows how to use the online platform well. Their duties include but are not limited to:

- Setting up the platform beforehand
- Muting audio lines and turning off cameras
- Removing online trolls from the platform

- Alerting presenters to things happening in the text chat
- Helping attendees learn how to use the different platform functions
- Helping presenters and attendees handle technical issues as they emerge
- Helping presenters monitor the Q&A at the end

All members of the presentation team should read through these guidelines, especially the *During the Presentation* section.

Choose and Set Up the Platform

Choosing an online platform and configuring its security settings is one of the most important things you can do to keep your online NAMI programs safe and secure. The settings we recommend will help you offer a quality experience to your attendees.

To offer NAMI presentations online effectively, the online platform you use must have certain functions. At minimum, the online platform you choose must have:

- **Video sharing capability** through screensharing (screensharing is also necessary for PowerPoints)
- **Chat function for Q&A**
 - Zoom has a special Q&A function that can be added to the room, which separates the questions from the normal chat and makes the submitter anonymous
 - If only a general chat function is available, ensure that one member of the team is capturing and flagging questions as they are asked and answered
- **Feedback tools**, which are buttons attendees can press to “raise their hands.”

As stated before, there should be a producer, or someone who is familiar with the online platform. Each online platform has different functions and settings, all of which should be set up before the NAMI class begins. Settings that we recommend are:

- **Audio only:** are you allowing attendees to connect using only their phone line?
 - Keep in mind that this limits their ability to participate, such as seeing the chat or others’ feedback icons. They will also be unable to see anything you are sharing in the room, such as videos, PowerPoints, or other documents.
- **Webcams:** disable webcams at first to give people the choice to turn them on
- **Screen and file sharing:** disable attendees’ ability to share their screens or files
- **Recording:** disable attendees’ ability to record the screen/video
 - Keep in mind that this does not disable basic screen capture (i.e. taking a picture of the screen), which is available on any electronic device. Attendees should know this before deciding to turn on their web cameras.
- **Chat privacy:** if possible, disable attendees’ ability to download the chat history (i.e. “record the text chat”).

- **One-on-one chat:** disable attendees' ability to chat privately with each other
 - The presenters and producer will need this ability in emergencies and each platform has a different way to do this. Adobe Connect, for example, has host-only private chatting, where only the host can have one-on-one conversations. Zoom uses breakout rooms, where hosts (teachers/producer) can bring an attendee into a breakout room.
- **Set up a “waiting room” or “landing page”:** this page will display important information before the presentation starts
 - Some online platforms, like Zoom and Adobe Connect, have the function of displaying a PowerPoint or message in the video conferencing platform, which attendees can read before the presentation begins. This message can explain when the presentation is going to start, tech requirements (such as headphones), and other pertinent information.

It is encouraged to limit attendees' permissions as much as possible. Trying to set up the platform while the NAMI presentation is in session is highly discouraged.

Presenters and producers are encouraged to have practice sessions with the online platform before delivering their first presentation; this will help them to become more comfortable with the technology.

Advertise Appropriately

How you advertise your NAMI presentation will determine:

- **What people know about the presentation** in advance; e.g. do they know the presenters are peers, not professionals?
- **Who will be able to access the online presentation;** e.g. an unprotected link will allow anyone with the link to enter the presentation; requiring registration to receive the link can prevent this (see sub-section *Register Your Attendees*).
- **How people will behave in the presentation;** e.g. will they understand how to use the platform, will they know they can be removed for inappropriate behavior?

Advertising appropriately in the beginning prevents confusion and disappointment in the future.

Register Your Attendees

We highly discourage advertising and delivering a NAMI presentation without requiring registration. Registering your attendees means collecting some information from them before they are given the link to join. You will want to collect their name and email address (to send them the evaluation later, if necessary). By identifying your attendees, you will be better able to manage them should they need to be removed from the presentation (e.g. for being an online troll). You'll also be able to control the amount who attend, which prevents overloading

your online platform. It may also be necessary for you to get into contact with attendees, such as sending them handouts and evaluations.

Depending on your capacity, you may choose several ways to register your attendees:

- Use a monitored Google Form
- Asking prospective attendees to email a staff person and capturing the information on an Excel spreadsheet or other roster
- Use a built-in form through the online platform (not available to all platforms) - be mindful that by doing it this way, the online platform also has the registrant's data

Remember to give out the link to your presentation only to registrants and ask them not to share it. Zoom has a handy function: "the waiting room." Attendees first enter the waiting room and must wait for someone with host access (the presenters or the producer) to bring them in to the actual NAMI presentation. This is a good way to control attendance and keep out trolls who try to re-enter.

Understand Data Collection and Privacy

Lastly, be aware of your online platform's data collection and privacy policy. These policies cover how a user's data is collected, stored, and used. Encourage your attendees to read it before attending the NAMI presentation.

However, most policies are not easy to understand so additional messaging is appreciated. As with all online experiences, confidentiality and privacy cannot be 100% assured; we encourage you to draft messaging asserting that and adding the things that your organization is doing to protect confidentiality and privacy (see suggestions in the sub-section *Choose and Set Up Your Platform*).

Here are some important things to keep in mind:

- Online platforms that require the attendee to create an account will have more information on the attendee than those that don't.
 - Good examples are Google Hangouts or Facebook Live: these online platforms connect directly to the attendee's existing Google or Facebook account, which means that some information linked to that account may be accessed during the NAMI presentation. Therefore, these platforms are not recommended.
- Striking the balance between anonymity/privacy and safety can be difficult. Consider what information you absolutely need to have about the attendee to keep them and the audience safe.
 - Some people may not want to use their real name. This is acceptable as long as they do show up with a name and can be called on during the presentation. Someone showing up just as a phone number or email address is not acceptable because they cannot be called on and will be difficult to track.

- Trolls, or people who attend just to heckle and insult, thrive on anonymity. If you are leaning towards anonymity in your presentation, you must have a way to kick out trolls permanently.

This sounds like a lot of work at the beginning, but your attendees will thank you for it.

During the Presentation

This guidance is written for NAMI presenters: all presenters should read this PRIOR to their online NAMI presentation.

Modifying Behavior for Online Presenting

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

- **Turn on your webcam.** 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!).
- **Limit distractions.** Make sure you are presenting in a quiet and private place where you will not be bothered.
- **Be mindful of audio quality.** Use a headset with a microphone if possible. Limit background noise or other things that would distract from your presentation.
- **Be aware of your 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.
- **Pay attention to the chat.** In your team of three, someone should always be watching the chat, as attendees often respond by typing there instead of speaking out loud. You may want to remind attendees that using the chat during the presentation 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.
- **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, as many of your attendees may be wearing headphones.
- **Adapt to a new style of Q&A.** Unlike an in-person presentation, it’s hard to get immediate feedback from an online audience. To facilitate Q&A, you’ll have to pay attention to the chat and answer questions as they appear. Remember to allow for silence as attendees are typing their questions. Asking for clarification, when necessary,

may take time, so it's okay to move on to the next question as you wait for the attendee to clarify. Remember to use I-statements and thank the attendees for their questions.

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 to address the technological concern.** Your producer will handle the technological side of the issue, while you and your co-leader 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 presentation began, then you've probably done everything you could within your locus of control. Be kind to yourself, especially when things are not going smoothly.

Handling 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 provocative comments, insult people, and cause general chaos.

When a troll has been identified, they should be immediately removed from the group. Do not argue or engage with them.

The teacher should acknowledge what has happened and help the group process and move on.

- Example script: "Hi everyone, I know what just happened was unpleasant. We've banned the individual from re-entering the room; if they re-enter, we'll ban them again. We ask that you ignore them and leave it to our team to handle them. I appreciate everyone's understanding."

Program-Specific Guidance

Showing a video can sometimes overtax your online platform, so it is essential to do a practice session before doing the presentation. During the practice session, you can see how the video

loads and plays, as well as how many attendees can enter the online platform before it begins to affect Internet connectivity. Keep in mind that attendees may have limited bandwidth and varying Internet connectivity.

The videos with closed captioning should always be used, as it provides you with an emergency option in case the audio cuts out or lags while video sharing.

If your online platform allows for files to be downloaded during the presentation, place the handouts and evaluations there, editing the evaluation form to include an email address where it can be submitted. If your online platform does not allow for this, email handouts in advance to registered attendees; after the presentation, follow up with these attendees by emailing them the evaluation.

After the Presentation

This guidance is written for both NAMI presentation presenters and state/affiliate staff.

Debriefing and Strategizing

We encourage everyone – the presenters, the producer, the state/affiliate staff – to debrief after an online presentation. This allows you to address concerns, improve, and celebrate your achievements together. When debriefing, here are some guiding questions:

- What went well? Why did it go well?
- What could be improved? What support is needed to make these improvements?
- Did the online platform serve all our needs? If not, are we open to trying a new one?
- How did this feel different from and/or like an in-person presentation?

We also ask that you report the data from your NAMI presentation, so we know how many presentations are offered online; see the *Introduction* of this guide for instructions.

If after debriefing you feel that you'd like to seek support for an issue or report a celebration and/or concern, please contact namieducation@nami.org to be referred to the appropriate NAMI program manager.

If you are interested in offering Spanish-language presentations contact namieducation@nami.org so we can help you with this process.

Practicing Self-Care

It can be very tiring to present your story – doing it online is an added challenge. Please take time to practice self-care. We offer you these final reflections so that you can be assured that your service to NAMI and your community is invaluable:

- An online community is much larger than an in-person one. You've met and impacted people you may have never come across.
- You created a sense of belonging and safety even without the benefit of a physically gathered community.
- You opened your story to a brand-new audience and stimulated new thoughts and conversations.
- You did your best, and NAMI is grateful to you for it. Thank you.

Online Guidelines: NAMI Support Groups

People come to a NAMI support group because they need a safe, nonjudgmental space to be with people who will understand and support them. A lot of thought and effort goes into creating that sense of safety and belonging. We owe it to our attendees to provide a quality online experience.

A quality online experience means that NAMI support group attendees:

- Feel that they've been heard and had the chance to learn from and support others
- Are not distracted by technical errors or ineffective moderation
- Are protected from heckling, insults, or online trolling
- Can rely on the hosting NAMI State Organization or Affiliate to honor their privacy and confidentiality
- Are supported in a mental or physical health emergency
- Feel better, not worse, after attending the support group

Please read these guidelines as you prepare to offer NAMI support groups online.

Before the Support Group Starts

This guidance is written for NAMI State Organization or Affiliate staff; when possible, this work should be done by the program director or coordinator.

Gather Your Team

Your support group team should consist of two trained NAMI support group facilitators and one producer.

The two facilitators should decide before the support group who will be the primary facilitator and who will be the secondary facilitator, much like an in-person support group. The primary facilitator should be the main person leading the group; the secondary facilitator should be there to assist in emergency response and to watch the chat for any side conversations. The two facilitators should have a way to communicate privately if necessary, such as a host-only private chat or through texting on each other's private phones.

The person who supports the technological aspects of the online class is called the producer. They do not need to be a trained NAMI program leader. A producer is someone who knows how to use the online platform well. Their duties include but are not limited to:

- Setting up the platform beforehand
- Muting audio lines and turning off cameras
- Removing online trolls from the platform
- Creating breakout rooms for emergencies (depends on online platform)
- Alerting facilitators to things happening in the text chat
- Helping attendees learn how to use the different platform functions
- Helping facilitators and attendees handle technical issues as they emerge

All members of the support group team should read through these guidelines, especially the *During the Support Group* section.

Advertise Appropriately

How you advertise your NAMI support group will determine:

- **What people know about the support group** in advance; e.g. do they know it's not therapy or a mental health service, do they know that observers are not allowed, etc.
- **Who will be able to access the online support group**; e.g. an unprotected link will allow anyone with the link to enter the support group.
- **How people will behave in the support group**; e.g. will they understand how to use the platform, will they know they can be removed/redirected for inappropriate behavior?

When advertising the NAMI support group, consider the following:

- Who is this message being sent out to? Who is being invited to join?
 - If the answer is everyone, will you have any type of vetting process (see sub-section *Protect Your Attendees*)?
- What messaging are you giving about the NAMI support group?
 - Are you including messaging about the specific audience (e.g. no observers, no family member/peer pairs)?
 - Are you including messaging about confidentiality expectations?
 - This includes attendees' contributions to confidentiality, such as logging into the group in a private place; e.g. not walking around outside or with friends/family while participating in the group.
 - Are you including messaging about service expectations (e.g. NAMI support groups are not a replacement for therapy)?
- What kind of technical support are you providing up front?
 - Are you including any information about how to access the NAMI support group online and how to use the platform once "inside?"

Advertising appropriately in the beginning prevents confusion and disappointment in the future.

Protect Your Attendees

There are ways to ensure your attendees' safety and privacy before the support group begins. Consider the previous description about what makes a quality online NAMI support group; to make attendees feel welcome, they must first feel safe. Besides briefing the facilitators on how to skillfully handle the group (see *During the Support Group* section), you can **1) collect emergency contact information, 2) control attendance, and 3) communicate the platform's data collection and privacy policy.**

We highly recommend that you collect emergency contact information so that you have an appropriate response if a mental health emergency arises or if the facilitator feels the attendee needs additional support after the NAMI support group. This information should include the attendee's name, emergency contact's name, and the contact's phone number and email.

Collecting emergency information must be done before the support group and the attendee should be required to submit it before attending. This can be done in multiple ways depending on the online platform you're using; familiarize yourself with your platform and see which of the following suggestions best suit you:

- If attendees need to create an account to access the platform, see if there's a way to build in an emergency info collection form.
- Ask attendees to email a staff person before sending the link so that the staff person can collect emergency contact info from them as a prerequisite for receiving the link to the support group. Capture this information in a roster (e.g. Excel spreadsheet).
- Create a registration process separately (e.g. via Google Forms) - this method is encouraged because it allows you to collect information and control attendance at the same time.

Controlling attendance means two things: ensuring that the person entering the support group has the appropriate lived experience and is coming for the appropriate reasons, and that the attendance doesn't grow unmanageably large. Again, your options depend on your online platform; see below for suggestions:

- Make sure that expectations for lived experience and attendance are clear in your advertising.
- Give out the link to your support group to only twenty people at a time to control attendance and ask them not to share it.
- Password-protect your NAMI support group and give out the password to only twenty people at a time and ask them not to share it.
- Zoom has a handy function: "the waiting room." Attendees first enter the waiting room and must wait for someone with host access (the facilitators or the producer) to bring them in to the actual NAMI support group. This is a good way to control attendance and keep out trolls who try to re-enter.

Lastly, **be aware of your online platform’s data collection and privacy policy.** These policies cover how a user’s data is collected, stored, and used. Encourage your attendees to read it before attending the NAMI support group.

However, most policies are not easy to understand so additional messaging is appreciated. As with all online experiences, confidentiality and privacy cannot be 100% assured; we encourage you to draft messaging asserting that and adding the things that your organization is doing to protect confidentiality and privacy (see suggestions in the sub-section *Choose and Set Up Your Platform*).

Here are some important things to keep in mind:

- Online platforms that require the attendee to create an account will have more information on the attendee than those that don’t.
 - Good examples are Google Hangouts or Facebook Live: these online platforms connect directly to the attendee’s existing Google or Facebook account, which means that some information linked to that account may be accessed during the NAMI support group. Therefore, these platforms are not recommended.
- Striking the balance between anonymity/privacy and safety can be difficult. Consider what information you absolutely need to have about the attendee to keep them and the group safe.
 - Some people may not want to use their real name. This is acceptable as long as they do show up with a name and can be called on during the group. Someone showing up just as a phone number or email address is not acceptable because they cannot be called on throughout the group and will be difficult to track.
 - Trolls, or people who attend just to heckle and insult, thrive on anonymity. If you are leaning towards anonymity in your support group, you must have a way to kick out trolls permanently.

This sounds like a lot of work at the beginning, but your attendees will thank you for it.

Choose and Set Up the Platform

Choosing an online platform and configuring its security settings is one of the most important things you can do to keep your online NAMI programs safe and secure. The settings we recommend will help you offer a quality experience to your attendees.

Unlike the NAMI classes and presentations, the NAMI support groups require no extra functions beyond an audio line and a place where individuals can see other attendees’ names and who’s talking. Webcams should be optional for attendees. The functions that are essential to NAMI programs are the “behind the scenes” security functions, which allow facilitators and producers to control who enters the room, who can be heard/seen, and the level of functionality each attendee has.

As stated before, there should be a producer, or someone who is familiar with the online platform. Each online platform has different functions/settings, all of which should be set up before the NAMI support group begins. Settings that we recommend are:

- **Audio only:** are you allowing attendees to connect using only their phone line?
 - Keep in mind that this limits their ability to participate, such as seeing the charts, the chat, or others' feedback icons.
- **Webcams:** disable webcams at first to give people the choice to turn them on.
- **Screen and file sharing:** disable attendees' ability to share their screens or files
- **Recording:** disable attendees' ability to record the screen/video
 - Keep in mind that this does not disable basic screen capture (i.e. taking a picture of the screen), which is available on any electronic device. Attendees should know this before deciding to turn on their web cameras.
- **Chat privacy:** if possible, disable attendees' ability to download the chat history (i.e. "record the text chat").
- **One-on-one chat:** disable attendees' ability to chat privately with each other
 - The facilitators and producer will need this ability in emergencies and each platform has a different way to do this. Adobe Connect, for example, has host-only private chatting, where only the host can have one-on-one conversations. Zoom uses breakout rooms, where hosts (facilitators/producer) can bring an attendee into a breakout room.
- **Set up a "waiting room" or "landing page"** to display important information before the support group starts
 - Some online platforms, like Zoom and Adobe Connect, have the function of displaying a PowerPoint or other message in the video conferencing platform, which attendees can read before the support group begins. This message can explain when the support group is going to start, tech requirements (such as headphones), and other pertinent information (e.g. the limitations of the support group, differences from therapy, expectations of confidentiality, etc.).

It is encouraged to limit attendees' permissions as much as possible. Trying to set up the platform while the NAMI support group is in session is highly discouraged.

During the Support Group

This guidance is written for NAMI support group facilitators: all facilitators should read this PRIOR to facilitating their online NAMI support group.

Adhering to Fidelity

As with in-person NAMI support groups, 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. The NAMI support group model is your tool for maintaining a sense of structure. We ask that you do the following:

- As you would in an in-person support group, arrive 15 minutes earlier than your attendees so you can check that the technology is working. Encourage attendees during registration or advertising to arrive 15 minutes prior to the beginning of the support group so they can also get used to the technology. 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.
- 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.
- Find a way to display the charts. You can do this either as “handouts” you give attendees to download, preferably before the NAMI support group, or via a PowerPoint that you screenshare.
 - The national education department has an example of a PowerPoint from NAMI Texas. Please email namieducation@nami.org for access to this resource in both English and Spanish.
- 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 possible, have a “resource table” 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.

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.

Modifying Behavior for Online Facilitation

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:

- **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!).
- **Limit distractions.** Make sure you are teaching in a quiet and private place where you will not be bothered.
- **Be mindful of audio quality.** Use a headset with a microphone if possible. Limit background noise or other things that would distract from your class.

- **Be aware of your 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.
- **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 may 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).
- **Pay attention to the chat.** In your team of three, someone should always be watching the chat, as attendees often respond by typing there instead of speaking out loud. You may 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. Encourage people to speak whenever possible.
- **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, as many of your attendees may be wearing headphones.

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.

Handling Difficult Situations

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

- **Attendees arriving late**
 - If your online platform has the ability to “lock the room” after a certain time, use this function to prevent attendees from arriving after check-in. This rule should be clearly communicated during registration and advertising. If your online platform has a waiting room function, such as Zoom, 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.
 - If your online platform does not have the ability to “lock the room,” then late attendees should be acknowledged as they enter and allowed to check-in when there is time. Facilitators should communicate to the late attendee that the group is in session and that they may not have time to get to the late attendee.
- **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 support group. The producer should be on the lookout for any attendees that drop out of the support group abruptly, so they can be ready to assist if they come back in.
 - Acknowledge that the attendee has left the support group, reassure the group (e.g. “We hope they’ll rejoin us”), and continue with facilitating.
 - 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.
- **Attendees not talking**
 - Allow for longer silences than you’re used to, as people may be processing or unsure of how to participate.
 - Jump in first with a friendly reminder about how to participate and tell attendees to remember to unmute themselves when they’re speaking.
 - If people still 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?”).
- **Attendees talking over each other**
 - This happens a lot when we don’t have body language to cue us in on when to speak. Allow these momentary interruptions to happen and take note of how much each attendee is speaking.

- 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?”).
- **Attendees monopolizing the group**
 - 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.”).
 - If it happens again, “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 facilitator 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

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 facilitator is handling the emergency, the other facilitator 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, using 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).

After the Support Group

This guidance is written for both NAMI support group team and state/affiliate staff.

Debriefing and Strategizing

- We encourage everyone – the teachers, the producer, the state/affiliate staff – to debrief after an online class. This allows you to address concerns, improve, and celebrate your achievements together. When debriefing, here are some guiding questions:
 - What went well? Why did it go well?
 - What could be improved? What support is needed to make these improvements?
 - Did the online platform serve all our needs? If not, are we open to trying a new one?
 - How did this feel different from and/or like an in-person class?

We also ask that you report the data from your NAMI support group, so we know how many support groups are offered online; see the *Introduction* of this guide for instructions.

If after debriefing you feel that you'd like to seek support for an issue or report a celebration and/or concern, please contact namieducation@nami.org to be referred to the appropriate NAMI program manager.

If you are interested in offering Spanish-language support groups, contact namieducation@nami.org so we can help you with this process.

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It can be very tiring to facilitate support groups – doing it online is an added challenge. Please take time to practice self-care. We offer you these final reflections so that you can be assured that your service to NAMI and your community is invaluable:

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- You did your best, and NAMI is grateful to you for it. Thank you.