Administration for Community Living Office of Healthcare Information and Counseling

Managing Through COVID-19 Work grouP - September 2020

Managing your Program and Team Remotely

Tip Sheets

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## Introduction

The U.S. Administration for Community Living (ACL) Office of Healthcare and Information Counseling (OHIC) convened several work groups in 2020 to help programs respond to the COVID-19 crisis. The Managing your Program and Team Remotely group tackled the problem of transitioning from in-person to virtual work with staff and beneficiaries. The tip sheets that follow help the programs continue their important work.

# Do’s & Don’ts: Communicating via Technology Tools and Virtual Platforms

The COVID-19 public health emergency has posed multiple challenges to SHIP and SMP programs. Technologies, including virtual platforms to host meetings, provide training, and counsel beneficiaries, have become important tools to mitigate program challenges. To be effective virtually, it is important to consider best practices when communicating with colleagues and clients via email or other virtual modes of communication. It is also important for SMP and SHIP staff and volunteers to be aware of the recording capabilities that virtual platforms maintain. The information put out online will likely be around for awhile, and this raises serious concerns about maintaining the confidentiality of client personal health information (PHI). The way we represent ourselves and our programs online will also live on.

How, then, should we communicate online about our work? How do we best represent our programs virtually? The do’s and don’ts in this tip sheet provide guidance to SHIP and SMP programs to navigate the ins and outs of technology tools and virtual platforms.

Language Use: Written, Verbal, and Body Cues

**✓** Do join meetings early. Log into the virtual meeting early and be ready to start a few minutes before the meeting begins.

**✓** Do use professional language verbally and in writing.

* Don’t use inappropriate language (e.g., avoid swearing or offensive language).
* Don’t gossip about clients or colleagues.

**✓** Do maintain polite and diplomatic approaches when discussing challenges or issues.

* Don’t increase your voice, yell, or personally attack others when you disagree.
* Don’t use ALL CAPS in emails, as this could be perceived as yelling.
* Don’t jump right into the meeting topic at the start of meetings.

**✓** Do build rapport with the meeting participants.

**✓** Do establish a safe space in meetings.

**✓** Do talk slowly and repeat yourself as appropriate.

* Don’t engage in political, religious, or personal discussions during SHIP or SMP program meetings or program-related emails.

**✓** Do employ effective communication skills, including listening and silence during meetings.

* Don’t interrupt others when they are speaking.

**✓** Do ask follow-up questions after others speak.

* Don’t abruptly change the subject after a colleague concludes a statement.

**✓** Do maintain alert body language if using a camera in a virtual meeting. Look into the camera as much as possible.

* Don’t lay down or slump over while on camera.
* Don’t rely heavily on the use of acronyms, as people unfamiliar with them will be lost.

**✓** Do say what acronyms mean and repeat appropriately.

**✓** Do be mindful of gender pronouns. For example, when you introduce yourself, you might specify which pronouns you use.

* Don’t assume what pronouns others will use.

Client Confidentiality: Personal Health Information (PHI) and Other Sensitive Information

**✓** Do proceed with caution when using and communicating about client-sensitive information, and ask your supervisor questions about your access to secure technology tools.

* Don’t send PHI over unsecured email or fax.
* Don’t share PHI with those not authorized to see it.

**✓** Do discuss and vent about complex cases in virtual meetings with colleagues while protecting your clients.

* Don’t, however, reveal PHI, as even “private” meetings could be hacked.
* Don’t reveal other client-identifying information in public meetings and forums (e.g., names, location, etc.).

**✓** Do review the SHIP National Technical Assistance Center’s Training and Certification or the SMP

Be Respectful and Be Aware of Your Camera: Virtual Meeting Etiquette

**✓** Do use a neutral background that is not distracting and allows for your clear visibility.

* Don’t sit or stand in front of inappropriate background imagery (e.g., politically charged posters or background imagery with potentially offensive content).
* Don’t sit or stand in front of a very bright light or a window with a lot of light behind it; this can cause discomfort for other participants and make it hard to see you.

**✓** Do use the camera when you are in a private room or when others are aware that your camera is on.

* Don’t let others disrupt or interrupt your meeting.

**✓** Do use the camera if you are dressed in business casual attire.

* Don’t use the camera if you are multitasking, such as eating, engaged in personal grooming, or other activities that can be distracting to others.

**✓** Do use the mute function during virtual meetings or when you call in to minimize background noise. *Tip: Mute buttons can be found on keyboards and keypads.*

* Don’t play music, keep the TV on, or engage in other conversations while on virtual meetings.
* Don’t let your animals be nearby if they are disruptive with noise and/or activity.

**✓** Do spend time with a prospective participant prior to meeting to ensure familiarity with the fundamentals of technology used, in order to minimize disruptions with a larger group.

**✓** Do be aware of what you have open on your computer when you share your screen during virtual meetings.

* Don’t accidentally share any personal information that does not need to be shared with the group.

**✓** Do stay seated and stay present. Keep your computer on a desk or table while using your camera.

* Don’t walk around with your laptop while you are using your camera. This will make your colleagues dizzy!

# Keeping Staff/Volunteers Socially Engaged

This tip sheet provides information to guide directors and coordinators through the process of keeping staff and volunteers socially engaged for your SHIP, SMP, or MIPPA program. The questions and examples in this tip sheet are based on ideas from SHIPs/SMPs/MIPPAs. The decision about which methods/options to use is determined by the director/leadership for each program.

## Staying Connected with Volunteers

Showing a volunteer that the program cares goes a long way with keeping them active and wanting to stay with the program.

* **Telephone/email (one-on-one with volunteers)** – Reach out individually by phone or email to catch up with volunteers. See how they are doing during COVID. Just a phone call can boost a volunteer’s spirit.
* **Coffee and tea with SMP/SHIP/MIPPA** – Have a Zoom call or Microsoft Teams meeting, which allows the volunteers some time to visit. Then review current topics/scams and ways to get your program’s mission out during COVID.
* **Confidential Zoom or Microsoft Teams meeting** – If volunteers need to discuss issues or concerns in private, hold virtual one-on-ones.
* **Watercooler chats** – Set up a chat room for volunteers to visit each other at any time.
* **Text messages** – Send a biweekly/monthly text message to check in on your group.
* **FUN** -Gather fun facts about volunteers to add to the “counselor bio” binder. (Keep all the counselors, location, name, date of birth, picture, and more.)

## Keeping Volunteers Engaged

* **Weekly email on trainings** – Send out a weekly email suggesting training to take in the SMP Resource Library. It is important to keep skills up.
* **Email blast** – Send out weekly emails on updated information or updated resource forms the DOI has created for them.
* **Chat groups/Zoom meetings** – If volunteers attend church or other meetings online, suggest they provide an SMP scam tip each meeting.
* **Distribution** – Volunteers can distribute SMP communications to their families, friends, and communities during COVID by sending an email on SMP scam tips each week. Volunteers can also drop off SMP flyers at Meals on Wheels or other community places.
* **Speeches via Webex or Zoom** – Offer Webex/Zoom training to volunteers interested in providing speeches online.
* **Feature a volunteer of the month** – Post a picture and bio of a volunteer each month on your social media (Facebook/Twitter, etc.).

# Keeping Volunteers Engaged During a Pandemic

Volunteers are an integral part of our programs. We want to keep our volunteers engaged during this pandemic. We need to take a needs assessment of our volunteers first to understand what directions we should go with each volunteer after this is done. You can break them down into categories such as outreach, data entry, answering phones, distributing data, etc.

## Needs Assessment for Volunteers

Basic questions to ask your volunteers for their needs assessment:

* How long have they volunteered with the organization?
* What past volunteer projects have they been a part of with SMP/SHIP/MIPPA?
* What were their favorite projects? What parts?
* Why were they attracted to volunteer with this program?
* How are they feeling during the pandemic?
* Do they have everything they need?
* What are their specific motivations?
* What are their hobbies and interests?
* What’s their availability?
* Are they interested in learning how to use virtual platforms for outreach?
* Are there any additional notes about their work, special talents, and preferences?

## Keeping Volunteers Engaged

These ideas can all be used to engage the volunteers with how they can help out in their counties, regions, organizations, etc.:

* Zoom calls with volunteers, “Coffee and Tea with SMP.”
* Monthly happy hour Zoom sessions with the volunteer coordinator and all state volunteers.
* Quarterly partner webinars to share current fraud trends and listen to what volunteers are experiencing in their counties.
* Calling volunteers to see what their needs are each month.

## Keeping Volunteers Informed

Keeping your volunteers informed about the current fraud trends and issues is a great way to engage with them. This also opens up a forum during any of the above meetings for them to express their concerns on current issues.

* Call volunteers to see what their needs are each month.
* Biweekly fraud alerts or volunteer bulletins.
* Email blast – “Scam of the Week.”
* Trainings – Encourage volunteers to take trainings through the SMP Resource Library to stay up to date.

# Pros & Cons when Choosing a Virtual Platform

Given the current COVID-19 crisis, outreach and education are taking place at a distance. This tip sheet provides an overview of some popular tools to reach out to and connect with your audience.

The National Council on Aging does not endorse any of these platforms or applications and recognizes that all tools have advantages and disadvantages. We hope this will help you find the tools that are right for you and your community.

Facebook Live

**Overview**

A feature of the Facebook social network that broadcasts footage in real-time by utilizing one’s camera on a computer or a mobile device.

**Pros**

* It can be used to reach a very large, already built-in audience, with over 1 billion users on Facebook.
* It is totally free.
* You don’t need to have a Facebook account to view a Facebook Live broadcast.
* You can decide who you want to view the livestream.
* Facebook users can engage with the live video as viewers can comment on the stream and give instant feedback.

**Cons**

* Privacy issues/concerns. Possible email harvesting.
* Resolution is HD, but only 720p HD, which is good but not the best video quality.
* If the stream is not set up to be shared with a general public audience, you will then need to sign up for Facebook.
* It can be a little slow at times, especially if one’s internet connection is not strong.

FreeConferenceCall.com

**Overview**

HD audio conferencing and online meetings with screen sharing and videoconferencing for up to 1,000 participants.

**Pros**

* Free teleconferences for up to 1,000 participants after you sign up for a free account. The service also accepts funds through their “pay what you can” model for those who would like to contribute.
* Users receive an email report after each meeting with details about participants and meeting duration.
* Calls can be recorded for a small fee.

**Cons**

* A short ad for the service plays when users join the call.
* Audio quality lags at times due to congestion.
* Free webinars and screen sharing are also available, but some user reviewers for the video service are negative.

Google Hangouts

**Overview**

Free messaging, voice, and video calls.

**Pros**

* Allows you to call any phone number in the world and allows for status messages, videos, and emojis to be sent in video or voice calls – group or individual.
* The basic platform is free for anyone with a Google account.
* Conversations (not video calls) can include up to 150 people.
* Hangouts is built into Gmail, YouTube, and Google Voice, plus there are Hangouts apps for iOS, Android, and the web.

**Cons**

* To use the free version, participants must have and use Google accounts. (With G Suite you can include a phone number and PIN on each of your meetings with no other configuration required.)
* To have the full Google Hangouts Meet (video) capability you need to purchase G Suite (starting at $6 per user per month).
* Video calls are capped at 100 (Gmail, G Suite Basic), 125 (Business) or 250 (Enterprise) people.

GoToMeeting

**Overview**

An online meeting, desktop sharing, and videoconferencing software package.

**Pros**

* Offers connection to Office 365 for users to schedule, manage, and join online meetings directly from their Outlook calendar.
* The pay version provides unlimited cloud recording and storage.
* A free version with limited meeting time and users is available.
* A long track record with an established reputation in the field (over 15 years of business) versus newer solutions with less history like Zoom.

**Cons**

* Basic annotation tools for screen sharing; no whiteboarding (unlike Zoom).
* For anything beyond 40-minute meetings you will need to purchase a license (starting at $12 per user per month).

GroupMe

**Overview**

A free mobile group messaging app owned by Microsoft.

**Pros**

* Free to users.
* You don't need to have the app to use GroupMe (can be used over SMS).
* Even those without smartphones can join.

**Cons**

* Does not have the end-to-end encryption offered by WhatsApp for security.
* The search function within the app is clunky and hard to use.

Microsoft Teams

**Overview**

An Office 365 communication and collaboration platform that keeps workplace calls, chat, video meetings, and file storage all in one place.

**Pros**

* Free with Office 365 subscriptions. (Discounted subscriptions apply for nonprofits starting at $3 per month per user.)
* Includes features like scheduling assistance, meeting note taking, screen sharing, meeting recording, and instant messaging.
* Offers the ability to hold large meetings, webinars, company-wide events, and presentations live with up to 10,000 attendees inside or outside your organization.

**Cons**

* Users will need an Office 365 subscription for some features.
* Additional features will require add-on subscriptions with added costs.
* Users must download the app on their device and may be reluctant.

OneClick.chat

**Overview**

A web-based video chat platform. OneClick.chat also offers a video communications platform aimed at events where presenters can speak to a distributed audience that can later be split into discussion groups.

**Pros**

* Ease of use – just one click.
* No downloads or add-ons are required to log on.
* Users receive a custom and permanent link that gives them control of their meeting room.
* Research funded by the National Institute on Aging has shaped the design of the products.
* Currently undertaking specific research on the platform and social isolation with adults 70+ through NIH funding.
* Also received grant funding to host virtual tai chi classes from Georgia Tech.

**Cons**

* A one-month trial is free, but beyond that the service starts at $15 per month for meeting rooms and $100 a month for a basic live event hosting subscription. (A 20% discount is offered to nonprofit organizations.)
* The meeting room functionality is capped at 12 participants.
* The platform cannot support devices that are more than five years old.

Skype

**Overview**

A telecommunications application that specializes in providing video chat and voice calls between computers, tablets, mobile devices, the Xbox One console, and smartwatches over the internet. Skype also provides instant messaging services.

**Pros**

* Offers live subtitles for the hard of hearing.
* Users can make free international calls (if the person they are calling also uses Skype).
* Provides end-to-end encryption for security.
* Skype Translate lets people talk in different languages while still understanding each other.
* Integrates with Alexa, the digital assistant that comes with Amazon Echo devices.

**Cons**

* Since the platform’s sale to Microsoft in 2011, there have been rumors it will be replaced with Microsoft Teams.
* You will need to purchase a premium version to take advantage of some of the app’s most helpful features.

WhatsApp

**Overview**

A free messaging and Voice over Internet Protocol (VoIP) platform owned by Facebook that has more than 1.5 billion monthly active users.

**Pros**

* Free to users.
* Can be used for individual chats, group chats, or broadcast lists.
* With group chats, you can share messages, photos, and videos with up to 256 people at once.
* Messages are end-to-end encrypted for security and privacy.

**Cons**

* Privacy concerns/issues. Participants will have to download the app to participate.
* Users will need to have a smartphone to join the conversation.
* Instructions are different for users of iPhones or Androids.

YouTube Live

**Pros**

* User-friendly, participants can click on an invite email link after the app is downloaded on their device.
* Livestreaming via webcam is an easy way to go live without the need for an encoder.
* You can start streaming from your laptop/desktop computer using your webcam anytime.
* Livestreams can be public, unlisted, or private.
* Analytics from your livestream are available to you after your event.

**Cons**

* Must be aware of copyright and recording issues.
* You cannot stream on a mobile device unless you have at least 1,000 subscribers.
* You cannot see participants.

Zoom

**Overview**

Free messaging, voice, and video calls. A free version is available for three people or less, but this eliminates telephone call-ins, which is a recent change. This is any easy way for volunteers to practice and learn to use on their own with friends and family at their own pace.

A license version offers large participant audience, closed-captioning, and webinars. License fees are reasonable.

**Pros**

* High video and audio quality.
* You can see videos of other participants in a small, floating panel while you're sharing your screen so that you can gauge their reaction while you're presenting.
* Breakout rooms are helpful when teaching a larger group.
* It is easy to record and share meetings.
* Intuitive and easy-to-use platform.
* Integration with Calendly (free online scheduling software).

**Cons**

* Forty-minute limit on free account calls.
* Zoom requires participants to download an app and/or a browser extension to join.
* As of March 31, 2020, new data was released that highlighted security concerns and weaknesses in the Zoom platform.

DocuSign

**Overview**

A tool to help participants sign waivers. Provides eSignature, a way to sign electronically on different devices.

**Pros**

* Allows you to have documents signed without physical contact or using the postal system.
* Integrates with Dropbox, Google Drive, and more.
* Allows you to automate workflows and processes (including generation, review, and approvals).
* •Signatures processed by DocuSign are compliant with the US ESIGN Act and the European Union's eIDAS regulation, including EU Advanced and EU Qualified Signatures.

**Cons**

* After a free trial, the service starts at $10 per user per month.
* Time is required to learn the new technology.

Privacy Concerns with Livestreaming in General

* **Privacy and Right of Publicity:** If you are recording an event, criteria must be established to get permission/release from all participants upfront. These are usually a matter of state law. (Some states are lenient while others are not.)
* **Sponsored Events:** Must be disclosed and a decision must be made as to sponsored ads (e.g., YouTube).