Preparing to Recruit, Train and Supervise Volunteers During a Call Surge

Part 1: Recruiting and Screening Volunteers

For the purpose of this training manual the word "volunteer" will refer to those persons who are not permanent staff of a 211 managing the disaster I&R services. The word "volunteer" will include:

- Professional I&R/Resource personnel deployed from other 211 centers
- Pre-trained or pre-qualified persons, who through previous arrangements have been screened, trained or prepared to assist the 211 in a disaster
- Virtual I&R/Resource personnel assisting in answering disaster calls or updating disaster resources from an area via technological linkages
- Spontaneous volunteers the I&R deems as qualified to assist in a 211 setting

Utilizing virtual volunteers may require adapted tools for screening, interviewing, supervising and evaluating services. The need for clear instructions and training about their role and responsibilities, receiving and using information in a rapidly changing I&R environment, supervision and evaluation of services rendered all need to be considered before utilizing virtual volunteers.

Tip 1: Write out a job description.

Determine the job positions that are most likely to be filled by volunteers and develop job descriptions. It will simplify the process if an organization's current job description format and wording can be used. Position descriptions are key elements of a successful volunteer program. They help you screen, place, and evaluate volunteers in a fair and reasonable way. Well-written volunteer position descriptions can help volunteers screen themselves. Volunteers can tell whether they have the necessary time, skills, and interest to perform the position tasks outlined.

Volunteers who understand your organization's expectations will do a better job and feel more satisfied with their duties than will volunteers who don't understand their role.

Tip 2: Recruit for ABILITY not AVAILABILITY.

Recruiting someone with the wrong skill set costs the organization time and energy and can result in a disaster within a disaster. I&Rs/211s who have responded to disasters unanimously agree that unqualified volunteers should not be used regardless of their availability. It is easier to say "No" during recruitment than to wait until the volunteer has arrived and an investment has been made in travel, training, and supervision.
If a volunteer is not suitable for performing I&R directly, there may be some other useful supporting roles that can be undertaken.

Some attributes of strong DISASTER 211 professionals are:

- Flexibility
- Sense of humor

- Grace under pressure
- Compassion
- Knowledge of telephone and computer software/hardware
- Able to work in chaotic work environments
- Willing to work long hours for low/no pay
- Follows instructions well
- Experience

Tip 3: Seek Volunteers from New and Existing Sources

- Engage past volunteers, current board members, and even former employees. These individuals are familiar with your work and are already loyal to your mission.
- Reach out to your state office on volunteerism. AmeriCorps members assigned in your area as well as AmeriCorps NCCC members are often recruited and activated for situations like this.
- Connect with your local chamber of commerce to advertise your needs. As many other corporations are working remotely or scaling back services in the economy - they may be willing to keep their employees active through volunteerism.
- Utilize online recruitment methods like allforgood.org, volunteermatch.org and Justserve.org

Part 2: Training

During a disaster, it is important to be FLEXIBLE. For the sake of time and complexity, you may not be able to do things as you normally do.

REMEMBER, most organizations spend WEEKS and even MONTHS training their new CRS to handle assessments, manage multiple softwares, log information and ask questions simultaneously while keeping clients calm and looking for answers to their questions.

Obviously, someone who has been trained for 1-2 hours will never have the same ability as a seasoned CRS. So change your expectations! This is the time to go from "Absolutely Fabulous" to "Good Enough". Be patient and calm with your volunteers.

When designing your training, plan on only having the attention of your trainees for 1-2 hours. Neither of you will have much time. You need them on the phone and confidently answering calls as quickly as possible.

How do you do that? Prioritize. Think about what the BASICS are that they need to be successful. Limit what you are going to teach them, and prioritize the content accordingly.

Try to conduct your training within an hour. Here are some recommended key topics. Expand or contract as you see fit. Remember, even with just these 5, that's 12 minutes per topic WITHOUT questions.

1. Orientation
2. How to answer the phone using your telephony system
3. The basics of the I&R process: Rapport, Assessment, Clarification, I&R Provision, and Closure
4. Searching for and retrieving information
5. Logging the call

Helpful tip: Use the free tool Loom.com to provide your training remotely. It's like recording a voicemail but with video and powerpoint if needed.

The assigned supervisor should use the job description and the performance appraisal tool during training. This helps both the supervisor and the volunteer clearly understand what will be expected of them and how it will be measured. It also creates an opportunity for dialogue about what may be perceived as unrealistic expectations or unattainable objectives.

Orientation

Volunteers will be more confident if they have clarity. Provide it.

Whether you are conducting an online training or a virtual training, the process should begin with an orientation and include a review of the community resources, the nature of the incident and the agencies in place to provide relief and recovery. Daily updates can be provided by e-mail, on-line conferencing or telephone conferencing.

Sample Orientation Checklist (add to, modify or condense these items depending upon your organization's culture, capacity, policies, protocols and procedures):

- ❏ Sign volunteers job descriptions/Review expectations
- ❏ Provide links to all software that will be used
- ❏ Provide login information for all software that will be used
- ❏ Sign waivers and agreements (including confidentiality agreements)
- ❏ Summary of disaster the organization's role in response
- ❏ Review of fundamental organizational policy and procedures
- ❏ Review of crisis protocols (when to dial 9-1-1) and emergency procedures
- ❏ FAQ's
  - ❏ Who is their primary contact if they have questions about their shift?
  - ❏ Who is their primary contact during a shift - especially if they receive a distressing call or need immediate support?
  - ❏ How will they receive new information?
  - ❏ When they will be expected to take a shift/schedule?
  - ❏ How would they debrief?
  - ❏ What training tools will they need and how will they access them?
- ❏ Here are some basic things for volunteers to remember:

- ❏ Remain calm, even when the caller is not. The tone of your voice will assure them that you will try and help them
- ❏ Only give out information you know. Don’t try to guess or make assumptions.
- ❏ Take breaks. Self-care is important during this time. If you’ve had a tough call and need to log off the phone for a minute, do so.
- ❏ Ask for help.

How to answer the phone using your telephony system

Most telephony software used by I&R organizations is cloud-based and requires a log in.

Prepare those ahead and assign them. They can be individualized for each volunteer or generic and shared between several volunteers depending on which shift they are taking.

Make sure everyone can log in and that they are familiar with and comfortable using the agent interface (remember most people don’t use agent interfaces to answer calls - its a new thing to them!)

Show them how to:

1) Answer/accept a call
2) Mute a call
3) Put a caller on hold
4) Transfer a call
5) End a call
6) Put themselves into an unavailable mode if they need to finish logging a call, go to the bathroom or take care of something else.

The basics of the I&R process: Rapport, Assessment, Clarification, I&R Provision, and Closure

Adapt these from your organization's existing training. Be sure to use and reinforce your organization's opening and closing statements for consistency.

Here are some simple definitions if needed:

Rapport:
Contact involves establishing an initial rapport or trust with the client.

In the early stages of a conversation, how a person feels is often more important than the problem itself.

Your first words are a greeting. And that greeting should be warm, friendly, and encouraging.

Most I&R services have guidelines for their staff on how to greet callers.

Assessment:
Assessment involves understanding the nature and extent of a client's situation.

Active listening, effective questioning, and empathetic communication are some of the most important skills needed to complete a quality I&R assessment.

Clarification:
Clarification within I&R is the process of ensuring an accurate understanding of a problem in order to identify an appropriate solution

The main technique that a CRS uses to achieve clarification is through paraphrasing (or restating) the essence of what the client has told you.

This does two things; it lets the client know what you have been listening to and it ensures that you have properly understood the reason for their call.

Paraphrasing involves providing a summary of what has been said in your own words. It lets you clarify what the client has said in order to avoid misunderstanding or misconception.

I&R Provision:
Once the assessment has been completed, it is time to provide the requested information and/or referral(s).

In order to provide appropriate information or make good referrals, you must know the basic structure of the services available in the community and be able to properly search the resources database.

A referral involves;
Identifying organization and programs capable of meeting the clients assessed needs
Providing enough information about each organization to help a client make an informed choice (and sometimes helping clients for whom services are unavailable to identify or explore alternative solutions).

Closure:
Closure occurs after contact has been made, an assessment conducted, the situation clarified, and the referrals provided.

This final step provides an opportunity to summarize and restate to clients what has occurred during the I&R process.

You will want to verify the client’s understanding of the situation and the information and/or referrals you have given.

Searching for and retrieving information

Here are the main challenges:

- Taxonomy Terms are complicated and difficult for people to quickly grasp.
- I&R software can also appear intimidating.

But the good news is:

- During times of emergency, the number of organizations that provide help is pretty limited and the type of information requested follows a narrow and fairly predictable pattern.
- The questions a volunteer needs to ask are limited

Options to consider:

- Make a list of the search terms that will be most needed. Even better have these set up as ready clicks on the screen
- Take screenshots of the different parts of the basic process and print them out as a reference
- Consider moving your information to a simpler, shareable, easily updated and more familiar form like a google doc or a smaller, specialized website

Logging the call

Keeping accurate records is challenging during a disaster but critical to demonstrate your impact. Take care now to make sure you are tracking contacts, chats, and texts so you can seek reimbursement (if applicable) or substantiate the extra work you are doing.

Here are the main challenges:

- The process required to log a call in most I&R software takes time to master
- Asking demographics is an important, but sometimes extensive, process and it takes time to become comfortable with asking and capturing those details

But the good news is:

- Not as much information needs to be captured during an emergency
- Reporting needs change and the level of data required for analytics decreases

Options to Consider:

- Create a simplified call logging form for the response in your software
- Create a simplified call logging form for the response and house it in another form/survey capture space like Google Forms (or another)

Part 3: Supervision during response

Supervision is often the first task that is set aside during an emergency, but it is also the worst possible step to eliminate, as it manages the human resource risks of the organization.

If the organization provides a job description, an orientation and training, it stands to reason it would want to ensure the volunteer was performing the services as requested and trained to perform.

I&R professionals' surveyed following deployment to disaster sites indicated this was one of the most frustrating parts of their experience. They did not know what was expected, they were not always sure who their supervisor was and they felt abandoned by the organization during their shifts. Most did not get direct feedback about their performance other than "thank you's" and could not determine if they were being thanked for just being present or if they had accomplished meaningful work.

Here are some things to consider:

- A structure for supervision should be clearly articulated in the written plan and staff trained accordingly.
- Use your already trained staff to act as supervisors to volunteers.
- Performance appraisals should be conducted on a regularly scheduled basis to let the volunteers know how their performance is impacting the organization and the community.
- Make a point of a welcome at the start of every volunteers shift and share any recent news
- Make a point of a check-in, thank you and quick debrief at the end of every shift
- Use cloud based/online communication options already available to your organization to keep communication flowing and send out notification and updates. Slack.com has a great free tool to help manage teams and Microsoft Teams is free for the first six months.

Suggested Communication:

Keeping in mind that communication is a process and not an event, here is a suggested timeline that could support clear and sufficient communication between the volunteer and the supervisor.

- Throughout day 1: provide verbal feedback/quick IM or texting feedback.
- End of Day 2; provide written feedback with acknowledgement of good performance and areas to increase skills, as well as a means to do so.
- End of Day 3, verbal/IM review is provided by the supervisor.
- End of service (if less than one week) or end of Week 1 if the volunteer is continuing for more than one week and end of each week of service until service is completed; a written review.
- An end of service provide a written appraisal and an exit interview.

During a disaster there is generally more work than can be physically completed by the staff at hand. Therefore it is prudent to have easy-to-use performance appraisal forms that can provide the organization with the means to address high performers as well as substandard performers. If the organization has a performance appraisal process that would easily migrate over to the evaluation of volunteers, use it. If not, a performance appraisal checklist can be found in the table below:

Job Tasks	**Good**	**Satis**	**Poor**	**Comments**
Answers calls promptly				
Uses database/resources effectively				
Uses telephone system correctly				
Demonstrates skill in managing caller				
Collect appropriate demographic data				
Uses resource data correctly				
Other				
Policies and Procedures				
Maintains confidentiality				
Signs in and out on time				
Other				
Interpersonal				
Participates in de-briefing				
Works well with others				
Ask for help appropriately				
Manage emotional and physical needs during work shift				

Recognition:

It is critical to the well-being of staff and volunteers that they know and receive recognition for the challenging work they accomplish each day during a disaster

Supervision extends past the time the volunteer leaves the site. Each volunteer should receive an exit interview and an opportunity to anonymously critique their experience. Each volunteer should receive a follow-up telephone call after returning home and depending on the severity of the disaster every week to two weeks for several months. Quarterly follow-up calls for up to a year after they return home is also advised.

Each volunteer should receive formal recognition for their work prior to leaving the site, if possible or within two weeks after their departure.