Hotline in a Box
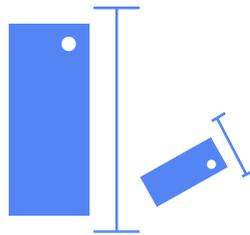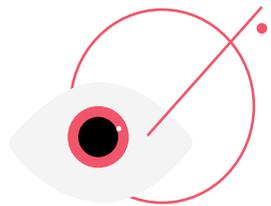
Hotline in a Box

Considering a hotline? This set of tools will help you assess, set up and manage different types of channels to communicate with communities during humanitarian crises.

What does this toolkit offer?

Ease the process of setting up channels for two-way communication with communities. Although many technologies exist to support operations and data analysis, humanitarian organizations desire guidance on how to select appropriate, affordable solutions given their context, capacity, and data needs.

Improve the quality of your communication with communities Without guidelines and professional standards, how organization act on feedback received through different channels can vary widely. In communities where many different channels exist, this can be challenging for community members to navigate.
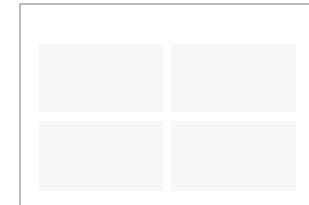
● *IN THIS TOOLKIT*

Phase-based tools
These tools support the assessment, definition, implementation, and evaluation of channels to communicate with communities.
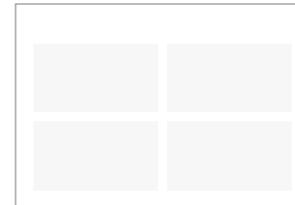
Case studies
This collection of case studies contains lessons learned to bring the challenges and opportunities of communicating with communities to life.

Tip cards
The humanitarian sector is filled with learnings from past responses. Learn from other practitioners with these helpful reference cards.

There continues to be extensive demand for the toolkit among humanitarian organizations, especially with the push for more collective approaches to community engagement initiatives. During 2019, more than 30 WFP country offices requested support from WFP headquarters to roll out community engagement channels.

Why do we need it?

In emergency situations, hotlines are often perceived as a quick fix by aid providers for providing information, assistance, or protection. However, implementing hotlines - or any other channel for communication - can take time, require multiple technologies to reach all people affected by crisis, and may require the capability of multiple languages.

"Hotline in a box" offers a solution to this challenge through a globally applicable toolkit of modules, for the identification, deployment and management of channels for communicating with communities.

"People think it's easy to have a hotline, but it's not as simple as they think. It takes time. There is no guidance at all. It's a jungle." - UNOCHA Field Officer

How should the toolkit be used?

Crisis response is chaotic and stressful. Sensitize your staff to this tool when they are not currently engaged in an acute emergency.

To successfully scale this type of innovation, a capacity building plan should introduce staff to new tools when they are not currently engaged in an acute emergency, giving them time to become familiar with the tools before using them.

● **WHO IS IT FOR?**

International and local humanitarian actors *with management, coordination, and data reporting responsibilities*

Government actors *in EOC/Risk Platforms who coordinate directly with humanitarian efforts*

Non-managerial contact centre employees, implementation partners, and local level humanitarian actors

"People are very willing to do things, but they just need to know how. People generally want to do the best job they can, and are keen to get their teeth into things, but they need instructions." – Angela (CDAC)
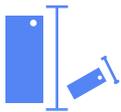
The tools

Worksheets and tools are split into four phases that can help you plan and develop your operation.

Assessment
Understanding the landscape to make informed decisions about when / when not to launch a channel for communicating with communities, and how to set it up for success.

Definition
Selecting the feedback mechanism and channels to ensure it effeciently targets affected people, and is operationally feasible.

Implementation
Preparing the service operationally, and bringing it to life in affected communities.

Evaluation & Transition
Adapting as the situation changes, which may involve scaling up or down, shifting the focus, or concluding the service entirely.

Assessment

Use these tools to help you understand the landscape and make informed decisions about when/when not to launch a channel for communicating with communities. A well-rounded assessment will help you make the right choices when collaborating with partners and communities and will help you set your channel up for success.

Assess Communications Needs

● **PURPOSE OF THIS WORKSHEET**

The assessment worksheet is intended to give a high level view of the main areas for consideration when a humanitarian team is deciding whether or not to launch a channel for communicating with communities.

● **IN THIS WORKSHEET**
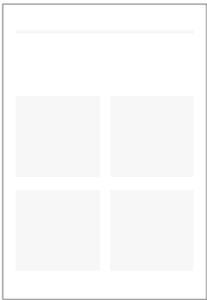
A. Assessing the
Cultural Context
Consider your audience
and key ecosystem
characteristics
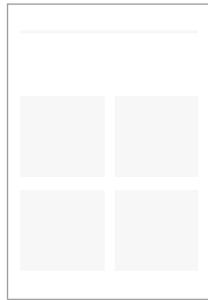
B. Assessing the
Communication
Landscape
Which modes of
communication does your
audience rely on? Which
are feasible locally?
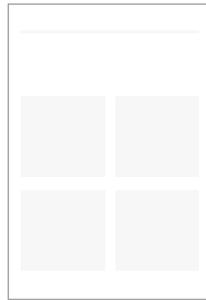
C. Assessing the
Operational Feasibility
Consider your core
capabilities and
operational constraints

Team
Project leader
Key country or
regional contacts

Materials
Pen
Internet
Local information

Duration
2 hours and
necessary follow up

A. Assessing the Cultural Context ⚐ ⚐ ⚐

● **WHO IS YOUR AUDIENCE?**

○ Women

○ Men

○ Elderly (65+)

○ Adults (26–64)

○ Youth (15–25)

○ Kids (0–14)

○ Diaspora

○ Child headed households

○ Disabled

○ Illiterate

○ Host nation residents who live in/near affected areas

○ Directly affected people

○ Indirectly affected people

Describe your audience:

Directly affected people include: sick patients, earthquacke survivors, refugee/IDP

Indirectly affected people include: friends, family, neighbors, colleagues of those directly affected

● **WHO ARE THE KEY INFLUENCERS IN THEIR NETWORK?**

For example: Village chief, religious leader, family patriarch or matriarch, celebrities

● **WHO ARE THE AUTHORITY FIGURES...**

At the household level:

At the local community level:

At the regional level:

At the national level:

● **WHAT IS THEIR RELATIONSHIPS WITH THESE AUTHORITIES?**

○ Hostile   ○ Trusted

○ Guarded   ○ Respected

Other

B. Assessing the Communication Landscape

- **WHAT MODES OF COMMUNICATION AND SOURCES DOES YOUR AUDIENCE RELY ON?**

Get news:	*Complain or voice concern:*
Share news, tell stories, or gossip:	*Ask questions:*
Coordinate plans or conduct business:	*Additional modes of communication:*

- **RATE THE FOLLOWING**

	Low	Med	High
Are people literate?	*Low*	*Med*	*High*
Are people digitally literate?	*Low*	*Med*	*High*
Do people own, or have access to, mobile phones or other communication hardware?	*Low*	*Med*	*High*
Can they afford to use mobile phones (e.g. cost of calling/data)?	*Low*	*Med*	*High*
Are they in dense urban areas or spread out across rural or remote areas?	*Low*	*Med*	*High*
Do people have access to a source of power (electricity or generator) to keep devices charged?	*Low*	*Med*	*High*
Is there connectivity in your target area (or can it be restored soon)?	*Low*	*Med*	*High*
Are there physical limitations to communicating with people?	*Low*	*Med*	*High*

Describe any of the above:

Check out: Understand your country context through both local research and global statistics.

www.data.worldbank.org
www.gsmaintelligence.com
www.itu.int/

Dig deeper: List any key statistics or anecdotes to help better understand your target populations' tech, connectivity, and useage norms

- **WHAT IS THE COUNTRY'S BASELINE FOR…**

What languages are spoken in your target areas?	*What are the language priorities?*	*Which of these languages can you support?*

C. Assessing the Operational Feasibility

● YOUR OPERATION

Is your organization allowed to have a hotline/ contact centre?	*Who might you collaborate with to launch/run the contact centre?*
Who might you collaborate with to resolve cases?	*Are any technologies banned (e.g. WhatsApp)?*
Do you need to apply for a license or otherwise file paperwork to get started?	

● EXTERNAL OPERATIONS

Are there contact centres operating in the same environment and/or targeting the same audience?	*Yes*	*No*
If yes, list those contact centres and describe how they may affect yours:		

● WHAT ARE THE LAWS, RULES, AND REQUIREMENTS OF…

Host Nation Government:	*Donors:*
Your Organization:	*Regional Ruling Bodies:*
Partner Organizations (if applicable):	*Other:*
What is the regulatory environment?	

Consider laws that govern:
- *Privacy and confidentiality*
- *Data security*
- *Do No Hard principles*
- *Use of social media*
- *Content dissemination*
- *Free speech*
- *Data colllection*
- *Imports/exports (especially on equipment)*
- *Labor/HR*

Overall Assessment

● **WHAT WAS THE LEVEL OF CONFIDENCE FOR EACH SHEET?**

A. CULTURAL CONTEXT	**B.** COMMUNICATION LANDSCAPE	**C.** OPERATIONAL FEASIBILITY
Summary & Considerations:	*Summary & Considerations:*	*Summary & Considerations:*

What are your next steps?

● **WHAT DOES THIS MEAN?**

These flags are meant to guide a well-rounded assessment process as you set up your response. Use them to flag any issues ahead of time as you go into the definition and implementation process.

Low confidence all around? Perhaps you should consider if you're the right partner to start and manage this hotline. High confidence in some places but not others? Consider partnerships. Low confidence in communications? Opt for simple technology and channels.

Still not sure if you should start a hotline? Check out IOM's Go-No Go flow chart in their Hotline Practitioner's Guide
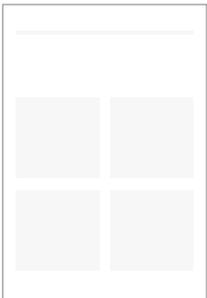
Definition

Translate your assessment into a plan by defining
your goals, channels, and feedback mechanisms.
Identify how your channels will be used and what your
operational needs are.

Define and Plan Your Response

● **PURPOSE OF THE WORKSHEET**

Support the key decisions needed to define a channel to communicate with communities.

● **IN THIS PACKET**

Define Your Purpose and Scope
Clarify your goals and what's in scope and not
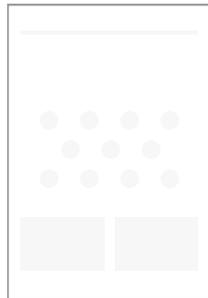
Identify Your Channels
Plan the channels crucial for your response
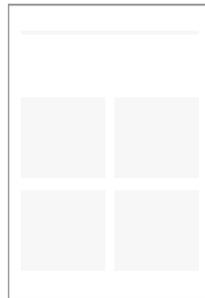
Plan Your Practical Needs
Identify your operational needs and budget required

Engage Your Community
Articulate how you will engage and build awareness of your communications channel

Team
Hotline or Communication response director
Key organizational partners

Duration
2-3 hours to do + follow up time

Materials
Packet
Pens
Chart Paper (optional)
Sticky notes (optional)
Key documents (e.g. budget, etc)

Define Your Purpose and Scope

● **OUR PRIMARY PURPOSE IS TO:**

○ Provide updates   ○ Link to services

○ Answer questions   ○ Deliver services

○ _____

What? Describe your main goals

● **AND WHO DO WE SERVE?**

Who? List your main audiences

● **WHAT IS THE SCOPE OF THE CONTACT CENTRE AND WHAT ISSUES OR TOPICS WILL IT ADDRESS?**

For example: Beneficiary feedback on a food distribution program; maternal health issues

● **GIVEN THE SCOPE OF YOUR CONTACT CENTRE, WHAT WILL YOUR CONTACT CENTRE NOT ADDRESS?**

For example: Request to join the food distribution program; issues related to women's health that are not specifically maternal health

● **HOW WILL YOU HANDLE OUT OF SCOPE REQUESTS?**

○ Provide callers with the phone number or contact details of another service

○ Log the issue, but refer it to another service point behind the scenes

○ Other:

_____

_____

_____

_____

Identify Your Key Contact Centre Channels

● **WHAT LANGUAGES WILL YOU SUPPORT?**

For example: English, French, Arabic

● **WHAT CHANNELS WILL BE PART OF YOUR CONTACT CENTRE?**

Committee Meetings

Help Desk / Field Volunteers

Suggestion Box

Hotline

Two-way SMS

Interactive Voice Response

Messaging Apps

Social Media

Chatbot

Email

Other:

Remember: Every channel selected will need to be staffed, managed, and included in your data plan.

● **HOW WILL YOU USE THESE CHANNELS?**

Channel:	Channel:	Channel:	Channel:

● **DON'T FORGET TO CONSIDER CHANNELS USED BY…**

○ Men and women equally

○ Children (if applicable)

○ The elderly

○ The disabled

○ Illiterate persons

○ Those in remote areas

○ Those without mobile phones or connectivity

○ Those without electricity

○ Those who wish to remain anonymous

Other considerations:

*Tip: Don't forget to reference the **Channel Directory** sheet to learn how to identify the right channels.*

Plan For Your Contact Centre's Practical Needs

● **WHERE WILL YOU BASE YOUR OPERATION?**

○ We have an existing space that can house the contact centre team

○ A base of operation has been identified, but needs to be set up

○ Not sure yet—we need to find one

Provide additional details, such as location and size

● **HOW WILL YOU STAFF THE CHANNELS?**

○ Use/re-assign existing staff

○ Hire new staff

○ Hire a third-party service provider ro run the contact centre

Provide additional details, such as the number of staff and what roles you may need

*Check out IOM's hotline job description templates in their **Hotline Practitioner's Guide***

● **WHAT ARE YOUR EQUIPMENT NEEDS/GAPS?**

Equipment	Have	Need

Equipment	Have	Need

What is your plan to fill equipment needs?

● **APPROVALS CHECKLIST:**

○ Senior Management approval

○ Donor approval

○ Host-nation/regulatory approval

Add any other approvals your contact centre may need

● **ESTIMATED BUDGET:**

Check out IOM's hotline budget planning tool in their Hotline Practitioner's Guide

● **ESTIMATED LAUNCH DATE:**

Engage Your Community And Build Awareness

● **PEOPLE WILL KNOW US FOR…**

For example: Speed, Friendliness, Confidentiality

● **WHAT AWARENESS CHANNELS WILL YOU USE TO GET THE WORD OUT ABOUT YOUR CONTACT CENTRE?**

Committee Meetings

Help Desk / Field Volunteers

Traveling Announcements

Flyers / Leaflets

Remember: Some channels are more expensive to organize and may require budget for materials or media.

Printed Notices / Posters

Broadcast Media / Radio or TV

Song / Jingle

SMS Blasts

Messaging Apps

Social Media Announcement

Other:

● **HOW WILL YOU USE THESE CHANNELS TO BUILD AWARENESS?**

Channel:	Channel:	Channel:	Channel:
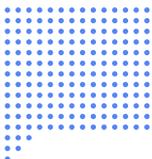
On the following page, write up your mission statement using these worksheets. You can print this sheet and hang it proudly in your contact centre for all to see.

Mission Statement

This channel for communicating with _____
Key Audience

will help
achieve / access / solve _____
Goal

through _____.
Channel

People will know us for our _____ **,**
Value

_____ **, and** _____.
Value   *Value*

Channel Guide

● **ABOUT THESE RESOURCES**

Selecting channels for service provision and raising awareness is a crucial part of any communicating with communities plan. Each offer various benefits and drawbacks depending on context and use. Use this guide to think critically through your choices.

Introduction to Channels

● **ANALOG CHANNELS**

An analog channel is a more traditional and physical form of communication and may not require any technology.

Focus Groups

Hotline

Committee Meetings

Suggestion Box

Notice Boards

Songs / Jingle

Volunteer / Help Desk

Radio

● **DIGITAL CHANNELS**

A digital channel relies on technology hardware (phones, computers, etc) and software (SSD, applications, Whatsapp)

Chatbots

Messaging Apps

Email

Interactive Voice Response

SMS

Social Media

Additional Channel:

Additional Channel:

This is a select list of channels used in humanitarian response and is not exhaustive. It does not include any proprietary systems, programs, or databases or get into details about specific social media platforms.

Channel Directory

• CHANNEL	• STRENGTHS	• WEAKNESSES	• TIP
Focus Groups	• Qualitative feedback and anecdotes can be a powerful way to summarize issues or gauge future impact • Can also serve capacity building and outreach functions depending on how discussion is structured • Low cost	• Typically limited to small groups (8-10 people), so scope is narrow and not necessarily representative of the larger population • Can be time consuming to perform	• Be aware of gender issues when conducting groups – you may need to host a focus group with only men, or only women, in certain regions or with certain topics • Select a private space for hosting your group so the atmosphere feels friendly and safe
Notice Boards	• Effective for simple and complex messages • Available to those without phones or other technologies • Low cost	• Limited geographic coverage • May exclude illiterate people • Can be difficult to update in realtime	• Works better in situations where large numbers of affected people are congregated together, such as in refugee camps, rather than in areas where people are spread across a region • To include illiterate people, ensure messaging is graphic
Help Desks	• Supports face-to-face communication, which many prefer • Provides immediate feedback in most cases • Possibly more accessible as it serves people in the immediate location • Allows for targeted feedback on a specific services	• Hard to sustain over time – typically, once the service has ended, the help desk ends • May exclude people that do not feel comfortable with giving in-person or non-anonymous complaints • Only supports languages of the staff present at the help desk, so may exclude those who speak other languages	• Highly recommended to have male and female staff at the help desk • Staff must be trained to answer frequently asked questions, record feedback, and follow up with issues they cannot immediately resolve

Channel Directory

CHANNEL	STRENGTHS	WEAKNESSES	TIP
Suggestion / Complaint Box	• Enables communities to provide anonymous feedback • Available to those without phones or other technologies • Low cost	• Requires writing materials, which aren't always available • Difficult for illiterate people • Often not trusted by community members since they do not know who will access information • May cause security issues for communities	• Box must be accessible —at a central location, at a reachable height • Requires staff to check messages frequently to drive trust that feedback is being received and handled • Ensure messages received in box remain secure and confidential
Committee Meetings	• Community ownership and oversight of program reduces risk • Direct interaction with communities • Versatile: adapted for both accountability and compliance Encourages sustainability Low cost	• Reinforces existing power structures in communities and may lead to exclusion of less powerful social groups • Doesn't allow for direct, individual, and confidential communication to your team	• Community committees or structures must be created to hold agencies accountable – action items can be mutually decided upon between agencies and the committees • The committees can and must expect responses and results from the agencies
Radio	• A familiar medium—even if a person or household doesn't own a radio, someone in the community is likely to have one and broadcast to a larger group • Large geographic and audience reach, including illiterate people • Allows exploration of issues in depth, and potentially allows for two-way feedback if a call in or SMS component exists in conjunction with the program • Usually low cost	• Excludes those without access to a radio • Programs tend to be in a dominant language and excludes that do not speak the language	• Very good for information dissemination or call-in, in both urban and rural settings. • Radios can often be distributed by humanitarian partners, or through persons of concern as a livelihood activity.

Channel Directory

CHANNEL	STRENGTHS	WEAKNESSES	TIP
Call centre/ Hotline	• Good for providing a rapid response, especially across a large physical area • Inclusive across a broad range of audiences (men, women, age groups, locations) • Versatile: can be used for both accountability and compliance • Very useful when humanitarian staff are not able to be in regular contact with persons of concern, such as urban areas with dense populations of affected people or those in remote, hard to reach areas	• Requires budget and resources • May exclude people without phones or those in an area with poor mobile coverage • May exclude those who cannot afford to call, if the line is not toll free • Requires significant outreach/sensitization efforts	• Hotlines require dedicated staff and continued effort to coordinate information exchange, referrals/response, and information management • It is important to be aware of all the legal requirements to operating a hotline before launching one • Toll free short codes are often more difficult and time consuming to get than regular phone numbers—take this into account when planning
SMS	• Flexible channel that may be used for outbound/blast messaging, inbound feedback from the community, or two-way communication such as surveys • Good for broadcast messaging to large groups of people across a wide physical territory • Rapid, and especially useful as an alert system • Messages can easily be sent • In different languages and therefore supports multi-lingual scenarios with less effort than other channels • Easy tracking and aggregation of data, which is good for project management	• May exclude illiterate people, those without phones, and those in areas with poor mobile network coverage • Messages have a character limits, so message content must be succinct and may lack depth or context • Cannot determine if received messages were well-understood	• Requires budget and/or agreements with local telcos,although negotiation may make this quite affordable • This channel is more appropriate for handling issues regarding targeted services in specific locations, such as distributions, rather than allencompassing programs across a region

Channel Directory

CHANNEL	STRENGTHS	WEAKNESSES	TIP
Interactive Voice Response	• Can handle high volume of calls without the need for live call centre staff, and can be used to support directing call traffic appropriately • Supports information dissemination across a wide range of topics, and can also support several layers of depth for more specific information • May be especially good at providing information people are embarrassed to ask about in person, such as sexual health • May support two-way communication, for example through surveys	• May exclude illiterate people, those without phones, and those in areas with poor mobile network coverage • Callers may find it frustrating to not speak with a live person • Does not handle complaints or requests that require follow-up	• VR is especially useful in complex, large-scale crises with information dissemination needs or when systems are needed to direct caller traffic to more targeted operator staff
Messaging Apps	• Multimedia: can send text, pictures, audio and video files, maps and documents • International: requires a connection to wifi or mobile data, but may work across countries, which is especially good for migration scenarios • More conversational in nature and often leads to group discussions and sharing • Very popular with youth	• Requires moderation to ensure rumors and bad information do not spread quickly • Can be time consuming to manage/respond • Can be difficult for data collection • Excludes those without smartphones and mobile data/wifi	• Many options exist on the market and popularity shifts easily , so you may need to use more than one platform or be prepared to shift to a new platform quickly • Privacy and data security issues need careful consideration • Messaging apps are seen as suspicious in some regions, for example in areas with government surveillance, so be sure to understand the cultural context before selecting this channel

Channel Directory

● CHANNEL	● STRENGTHS	● WEAKNESSES	● TIP
Social Media	• Due to the number of platforms, provides a variety of options for one- and two-way communication in public, semi-public, and private settings • Works especially well in regions with high smartphone use, readily available free wifi, and advanced digital habits • Multi-media: can send text, pictures, audio and video files, maps and documents • International: requires a connection to wifi or mobile data, but may work across countries, which is especially good for migration scenarios • More conversational in nature andoften leads to group discussions and sharing	• Requires moderation to ensure rumors and bad information do not spread quickly • Can be time consuming to manage/respond • Can be difficult for data collection • Excludes those without social media accounts, or access to devices/internet for checking those accounts, and may also exclude the illiterate	• Many options exist on the market and popularity shifts easily, so you may need to use more than one platform or be prepared to shift to a new platform quickly • Privacy and data security issues need careful consideration • Be mindful of creating a consistent presence for your crisis or service to encourage findability, for example by using a dedicated crisis hashtag on Twitter or a dedicated group on Facebook
Chatbot	• Can handle high volume of requests without the need for live staff, and can be used to support directing traffic appropriately • Supports information dissemination across a wide range of topics, and can also support several layers of depth for more specific information • May be especially good at providing information people are embarrassed to ask about in person, such as sexual health • Integrates with popular social media, such as Facebook Messenger, and therefore reduces the need for users to install or learn new software • Multimedia: can share text, pictures, audio, and video files	• It takes time to train the software, so is better suited to long-term crisis scenarios only • Callers may find it frustrating to not speak with a live person • Excludes those without social media accounts, or access to devices/internet for checking those accounts, and may also exclude the illiterate	• Particularly good for situations with heavy or complex information and coordination needs • Always have a guardian to prevent abuse of the system • Have protocols for when the chatbot passes the conversation to a live person to continue the case

Channel Mix Case Studies

BURUNDI
109 HOTLINE

How one Burundian citizen saved a life because of a SMS blast.

Channels in action

- SMS Blast
- Notice Boards / Banners
- Hotline

Janette remembers a text message she received on her phone nearly 6 months ago as part of a SMS blast and information campaign by the Burundi Red Cross to sensitize people about the existence and services provided by the 109 hotline. On watching her friend Esperance go into labour on the street, Janette called 109 immediately and was able to get her friend an ambulance in time. Both mother and baby survived.

"It stuck in my head because it (SMS) said that I could call at anytime of the day and for any issue and that calling the hotline was free."

UGANDA
FRRM HELPLINE

An interagency helpline to enhance two way communications between refugees and assistance organizations.

Channels in action

- In-built Referral Network
- Toll-Free Hotline

Through calling the helpline, refugees and host community members can access reliable information, report fraud and corruption, provide feedback and access referrals for support services from UNHCR and partners. The platform's inbuilt referral network currently host an impressive 489 individual focal points within 38 partner organizations working across 31 settlements allowing refugees' queries to be sent to frontline responders at the click of a button.

YEMEN
TAWASUL

A refugee assistance call centre on medical issues, food distributions and requests for individual protection.

Channels in action

- Referral Pathways
- Toll-Free Hotline

In collaboration with local partner AMIDEAST, UNHCR established Tawasul (which means 'dialogue' in Arabic). Within a few months, the call centre was receiving 1,091 calls per month. However, in late March the call centre had to suspend activities following an intervention from the authorities; and Tawasul was closed completely in June 2016.

As it opened, UNHCR's representative in Yemen – Johannes van der Klaauw – described the call centre as an "avenue for complaints, criticism and feedback" and a mechanism to strengthen accountability across the humanitarian community.

Use this space to reflect on the case studies or take notes

Implementation

Now, let's respond. Bring your operation to life in affected communities and collaborate in real time with local partners.

Coordination & Referral Pathways

● **PURPOSE OF THIS WORKSHEET**

One of the most critical and complicated aspects of any response is coordinating with other organizations and local partners. Use these sheets to both plan and document your response and referral plan.

● **IN THIS WORKSHEET**

Coordination
Plan your coordination response for key issues

Referral Pathways
Use this as a reference sheet for your various referral pathways

Team
Contact centre leadership
Local partners
Collaborators

Materials
Pens and markers
Sticky notes
Phone

Duration
2 hours – ongoing updates

Coordination

Coordination is hard. Knowing who to talk to, when, and for what will help you for both internal and external coordination referrals. Start by using this as a tool to help you draft coordination pathways based on issues that arise and the proper referral chain to resolve. Create a final version to use across your contact centre as reference and update regularly.

● **ISSUE**

What is the topic or challenge being addressed?

Title   Urgency Level

Description & audience

● **REFERRAL PATHWAY**

Where should this issue be referred?

Program & organization

Location & Logistics

Contact person & Information

● **SUPPORT & VERIFICATION**

What other details support the resolution of this case?

Additional information

Capture & verification

Referral Pathways

Use this worksheet to populate the different programs and people involved in the referral process. It will
help you coordinate cases better both internally, within your organization as well as outside.

● **ORGANIZATIONS & PROGRAMS**
What are the currrent or planned programs
that your contact centre needs to know about?

● **CONTACT PERSON**
Who is the main contact person at these
organizations/programs?

● **REFERRALS & VERIFICATION**
What gets referred to this partner for
verification and resolution?

Name:	*Organization & program:*	
Phone number:	*Location:*	
Email address:	*Start/end date:*	
Name:	*Organization & program:*	
Phone number:	*Location:*	
Email address:	*Start/end date:*	
Name:	*Organization & program:*	
Phone number:	*Location:*	
Email address:	*Start/end date:*	
Name:	*Organization & program:*	
Phone number:	*Location:*	
Email address:	*Start/end date:*	

That's all!

Evaluation & Transition

Adapt as the situation changes, which may involve scaling up/down, shifting focus, or concluding the service. Use these tools to assess your situation and start a discussion about the next phase of your contact centre.

Contact Centre Evaluation

● **PURPOSE OF THIS WORKSHEET**

Use these worksheets to evaluate and evolve your efforts as the needs of your community change and the response landscape shifts.

● **IN THIS WORKSHEET**

Transition Evaluation
Complement your internal reporting criteria with this conversation guide to evaluate your efforts

Contact centre Roadmap
Plan your response with this simple canvas

Team
Team leader
Staff leaders
Community leaders
Organizational partners

Materials
Pens and markers
Sticky notes

Duration
2 hours and follow up conversations

Transition Evaluation

● **CONTACT CENTRE PERFORMANCE**

How many calls did you receive this quarter? Is the overall trend increasing or decreasing?

What is the rate at which you close cases? Is this rate increasing or decreasing?

● **GAPS**

Are there new people, topics, or issues or concerns that the contact centre should be handling?

● **IMPACT EVALUATION**

What is the affected community's impression of the service? Are you delivering on the values you defined for the service? Feel free to note anecdotes.

● **OVERALL REPORT CARD**

How well are you delivering on the goals and success metrics you defined for your contact centre? Is your mission still relevant?

● **SHOULD YOUR CONTACT CENTRE**

○ Carry on the great work?

○ Redefine its mission?

○ Engage new partners?

○ Be handed off to someone else?

○ Wind down entirely?

It's okay to shift, change, or event close your contact centre.

Use these questions to have internal discussions and fit your response to the needs of the situation and community as it evolves.

Contact Centre Roadmap

● **IN THE NEXT 6 MONTHS**

Mission and cultural context

Communication landscape

Operational feasability

● **IN A YEAR**

Mission and cultural context

Communication landscape

Operational feasability

● **YOUR VISION FOR THE FUTURE AND BEYOND**

Describe the future vision for your contact centre

Hotline in a Box

Case studies

● **ABOUT THESE RESOURCES**

Case studies are great to have on hand while planning, implementing, and assessing your channel for communicating with communities. Print them out and keep them in your office to spur discussion. What stories would you tell about your own community communication channel learnings?

1. Sierra Leone 117
2. El Jaguar - UNHCR, Central Americas
3. UNHCR Call Centre, Jordan
4. Tawasul, Yemen
5. FRRM Inter-Agency Helpline Uganda, UNHCR

Case Study: Sierra Leone 117

This case from Sierra Leone's 117 Contact Centre, illustrates how its goals transitioned to provide new services based on the needs of its affected communities.

● **TRANSITION 1. MATERNAL HEALTH TO EBOLA CRISIS**

117 originated as a national hotline for maternal and child healthcare information, but was rapidly transitioned to support the Ebola epidemic in 2014 under the coordination of the national Emergency Operation centre (EOC). During the emergency, paper forms were replaced with several software solutions to handle surge, and staff was significantly scaled up.

● **TRANSITION 2. SUSTAINABILITY THROUGH BURIAL CERTIFICATES**

Once Ebola was contained, 117 was scaled down to support people in obtaining burial certificates, which allows for the immediate tracking of new cases as a passive surveillance mechanism.

● **TRANSITION 3. A MUDSLIDE DISASTER STRIKES**

When a mudslide struck Freetown in 2017, affected people started calling 117 for help and to report missing loved ones – it has become known as a trusted emergency hotline across the country.

Case Study: Sierra Leone 117

A toll-free, nationwide phone alert system was established for rapid notification and response during the 2014–2015 Ebola epidemic in Sierra Leone. The system remained in place after the end of the epidemic under a policy of mandatory reporting and Ebola testing for all deaths, and, from June 2016, testing only in case of suspected Ebola. We describe the design, implementation and changes in the system; analyze calling trends during and after the Ebola epidemic; and discuss strengths and limitations of the system and its potential role in efforts to improve death reporting in Sierra Leone. Numbers of calls to report deaths of any cause (death alerts) and persons suspected of having Ebola (live alerts) were analyzed by province and district and compared with numbers of Ebola cases reported by the WHO.

Nearly 350000 complete, non-prank calls were made to 117 between September 2014 and December 2016. The maximum number of daily death and live alerts was 9344 (October 2014) and 3031 (December 2014), respectively. Call volumes decreased as Ebola incidences declined, and continued to decrease in the post-Ebola period. A national social mobilization strategy was especially targeted to influential religious leaders, traditional healers and women's groups. The existing infrastructure and experience with the system offer an opportunity to consider long-term use as a death reporting tool for civil registration and mortality surveillance, including rapid detection and control of public health threats. A routine social mobilization component should be considered to increase usage.

Key Takeaways

By evolving 117's goals and services, the hotline was able to cut down on infrastructure, personnel, and cost.

A hotline has the capacity to support several issues and communities provided sufficient political will, funding and continuous social mobilization and community engagement to increase usage.

Case Study: El Jaguar - UNHCR, Central Americas

UNHCR in the Central Americas recently aimed to strengthen and expand existing information and communication efforts. As such, it developed a communicating with communities (CwC) strategy that prioritizes providing messages of orientation and support to migrants, applicants, and refugees, and space for them to communicate and provide feedback to UNHCR.

● DETERMINING THE PLATFORM

The project began as part of UNHCR's Innovation Fellowship programme, in which human-centred design and frequent and comprehensive user testing play an important role. As such, UNHCR undertook an information and communication needs assessments with refugees, to determine their preferred channels for finding out about their rights to asylum, and for accessing support. Facebook was a preferred platform, with communities already using it to contact friends and loved ones. When community members are in transit, however, mobile platforms including Facebook are less utilized due to roaming costs.

● BUILDING A HOTLINE

UNHCR understands that a number of community members are not utilizing Facebook, whether due to the prohibitive cost of a data package, or for reasons related to digital literacy. As such, a hotline was linked to the Jaguar Facebook platform to provide an alternative channel.

The Jaguar: a very popular animal on the southern border, the protector of the fields and the guardian of the jungle; an animal that everyone knows and that has been venerated for thousands of years.

● OUTREACH

UNHCR is still in the process of reaching out to communities regarding the platform and its associated services. As of June 2018 it has 6,000 followers on Facebook, and a good response rate to direct messages on the platform, with questions being answered within a couple of hours of receipt on average. A number of videos are being produced to further support community outreach, with aim to result in a steady increase of followers on the Facebook platform.

Case Study: El Jaguar - UNHCR, Central Americas

UNHCR in Central America (from Guatemala and Mexico) and its partners have set up a platform to provide information on asylum systems in the countries of origin, transit, and destination to people on the move, fleeing from insecurity and persecution. The platform consists of a Facebook page and hotline under the name "Confiar en el Jaguar" (in English 'Confide in the Jaguar').

UNHCR and partners specifically wanted to move away from humanitarian branding and logos as it was felt that something more compelling could be created that breaks with communities preconceptions of humanitarian support. El Jaguar was used as it is a symbol of trust and protection, concepts that are specifically important for migrants/refugees coming from Central America. UNHCR aimed for El Jaguar to become one of the main digital information networks for migrants, asylum seekers and refugees in the region.

On the platform, UNHCR shared information and protection messages to people of concern, and answered directly to questions via Facebook's messenger function. If direct queries are posted in comments, users are encouraged to not share their information publicly but to utilise direct messaging for follow up with the office.

A toll-free phone number (+1 800-226-8769) was set up and was first socialized among people of concern at the beginning of 2016, unconnected with the Jaguar brand. By 2017 the number was more established, with an increase in callers, and was consistently referred to in all related communication materials with El Jaguar, essentially becoming part of the support function. It has subsequently been advertised heavily through the Facebook page Confía en El Jaguar.

The line has only a modest amount of calls compared to Facebook interactions. On average El Jaguar hotline receives approximately 60 calls monthly, with the majority of callers asking about asylum procedures. The line is answered by the UNHCR Protection Unit and monitored by the Mass Information unit. Records of calls are captured using KoBo Toolbox, installed on UNHCR's secure servers, and data is subsequently analysed for follow-up and analysis of trends.

 You can review the KoBo format at the following link: https://enketo.unhcr.org/x/#COzdcdZ7

Key Takeaways

UNHCR created a compelling brand – differing from humanitarian branding – to instill trust in the information being provided through the Facebook platform and associated hotline.

An assessment was undertaken with the population, establishing that Facebook was one of the preferred communication channels. In addition, a hotline was incorporated in Mexico to ensure inclusivity of population groups not using social media services.

Case Study: UNHCR Call Centre, Jordan

Jordan has one of the largest refugee helplines in the world, which currently supports nearly 150,000 phone calls per month. Since its inception in 2008, staff at the helpline have responded to more than 1.7 million calls, giving support and advice on a range of issues to refugees in the Kingdom. The UNHCR Jordan telephone helpline is one approach UNHCR uses for two-way communication, providing information and feedback for more than 730,000 refugees living in Jordan.

SCALING THE HOTLINE

The helpline started with only two operators and utilised Nortel technology to deal with approximately 300 inbound calls per year. At the height of the Syrian refugee crisis, funding was provided by the Swedish government to enhance the system. As such, the call centre switched to Cisco technology, capable of handling a greater number of calls, and an additional 12 operators were hired to support increased demand.

BUILDING OUT INTERACTIVE VOICE RESPONSE

The UNHCR helpline was enhanced in late 2017 with Interactive Voice Response (IVR) technology, in order to increase the number of calls answered, and direct callers more quickly to the right information. After providing their unique file number and a security code, refugees can choose their topic of information such as cash assistance, health, registration, or other concerns. Most calls (90%) can be handled by helpline staff, but when an issue is raised that requires a referral and follow up, a 'referral ticket' is logged into UNHCR's case management system, and sent to the appropriate expert staff. For non-emergency questions, refugees are informed that they will be contacted within a one working week. Emergency calls are responded to immediately.

Case Study: UNHCR Call Centre, Jordan

Following the huge influx of refugees entering Jordan from neighboring Syria in 2014, UNHCR upgraded what was initially a two person helpline system to respond to the increasing number of calls received. In 2017, UNHCR received on average 45,000 calls per month, and was able to answer around 60% of all calls; those with a wait of around four minutes were often abandoned by the caller, with the refugee then phoning again at a later time. The system underwent an additional upgrade in late 2017 with enhanced automated response features, aiming to reduce the number of abandoned and unanswered calls. With the new system, nearly 150,000 calls are answered in a given month, equivalent to 70% of all calls to the helpline.

The helpline is staffed by 14 UNHCR staff, and is open weekdays between 8am and 4pm. Calls to the helpline are free when using the Zain SIM card provided by UNHCR to refugees at no cost. As of February 2018, 143,000 refugee families have benefitted from the free SIM card.

The helpline uses ©CISCO Unified Contact Centre Enterprise technology, which includes a call recording system for training and oversight purposes, and allows for detailed monitoring and statistical reporting. The system has recently been upgraded from 30 lines to 60 lines thanks to the new Interactive Voice Response platform. At capacity, 14 staff can be speaking directly to refugees, while 46 lines can provide automated information.

Key Takeaways

By installing an Interactive Voice Response System, the UNHCR Call Centre in Jordan was able to cut down on waiting times, be more efficient, and reduce costs.

Over time UNHCR has aimed to optimise each component of the call-centres, making it as efficient as possible. This includes ensuring that agents are optimally busy, and that the hardware and software for managing cases is streamlined with the cell-centres operation.

Case Study: Tawasul, Yemen

In late 2015, UNHCR in Yemen – in collaboration with local partner AMIDEAST – established Tawasul (which means 'dialogue' in Arabic). Within a few months, the call centre was receiving 1,091 calls per month, AMIDEAST had established a caller database, and staff were managing incoming questions on medical issues, food distributions and requests for individual protection. However, by late March 2016, the call centre had to suspend activities following an intervention from the authorities; and Tawasul was closed completely in June 2016, 6 months after it opened. The premature closure of the centre in Yemen means that this service is no longer available to communities, which has limited the scope of this research. Despite this, the following lessons have been drawn from Tawasul's short running period.

"As it opened, UNHCR's representative in Yemen – Johannes van der Klaauw – described the call centre as an 'avenue for complaints, criticism and feedback,' and a mechanism to strengthen accountability across the humanitarian community."

● **OUTREACH AND SOCIALISATION OF THE CALL CENTRE IS CRITICAL**

In the Yemen context, outreach for the call centre was far more effective than anticipated. Initially, the plan was to advertise Tawasul in a limited number of governorates (Sana'a and Aden), then expand nationally as the project grew. However, local partners and communities were very effective at 'spreading the word'. Printed cards with the toll-free numbers were shared widely, and partners and communities circulated the number through social media. The call centre opened with 100 calls from across the governorates in the first month, and peaked at 1,091 calls three months later. There were plans to run a media campaign to further advertise the services – but this was cancelled due to the suspension. The call centre had also planned to extend its outreach through an established youth network which would run consultations with community groups and members, then phone through the issues raised. Although the team in Yemen did not have the opportunity to test this initiative, they highlighted the importance of improving the inclusivity of Tawasul – by reducing the 'digital divide' and providing access for persons of concern without the means or resources to call Tawasul.

Case Study: Tawasul, Yemen

● **ADOPT TRUSTED COMMUNICATION CHANNELS FOR SENSITIVE TOPICS**

Tawasul demonstrated that in certain contexts a call centre is appropriate for sensitive issues. The type of calls received covered a range of protection issues – for example one journalist reported being threatened and was asking for support. The call centre also had dedicated toll-free lines – one for women and one for men – this helped create an environment conducive for sharing sensitive information. To build trust, it is critical that information isn't just shared; issues raised must be acted on. AMIDEAST and UNHCR mapped referral pathways so that information shared – including sensitive concerns – could be responded to and services provided when necessary.

● **NEVER UNDERESTIMATE THE SENSITIVITY OF A CONFLICT CONTEXT**

The suspension and subsequent closure of the call centre highlights how sensitive operating in active conflict contexts is. Conflicts are about weapons, but also about narratives, information and dis-information. As such, activities involving the sharing of information – particularly visible ones such as a call centre – are often subject to censorship. It is not possible to assess how this closure could have been mitigated, as negotiations were held with the authorities prior to Tawasul's set-up and from March as soon as the initial concern was flagged. The learning from the Yemen experience highlights the importance of ongoing consultation and planning with key stakeholders – including those with the authorities. In addition, it is important that planning includes contingency for premature closure. This includes alternative channels and close-out activities, should services be terminated.

● **NOT LISTENING DISINCENTIVIZES COMMUNITIES TO ENGAGE**

Following closure of the call centre, AMIDEAST recorded a message for callers to explain that the service was suspended and information could not be provided at that time. The number of calls coming through very quickly dropped off as word spread that the call centre was closed. There were few repeat callers testing if the line was reopened. The rapid decrease in callers shows how quickly communities disengage from communication channels that are no longer open.

● **COORDINATION AND MUTUAL ACCOUNTABILITY ARE KEY**

To adequately respond to feedback and ensure adequate referrals, every stakeholder must have a clear understanding of the role they play in maintaining the mutual accountability of the mechanism. This was a challenge in Yemen. Some partners were less engaged than others, in some instances cooperation broke down and referral pathways were not maintained. The resources needed to coordinate information sharing, curate content, and ensure adequate services were substantial; the challenges faced were not fully addressed in the short timeframe of the centre's operation, however. A key learning was the importance of integrating the call centre within the existing

Key Takeaways

Situations, technologies, communities and conflicts continue to evolve – as will the way we share information with communities. Partners in Yemen are continuing to explore ways to effectively engage communities post-Tawasul.

Case Study: FRRM Inter-Agency Helpline Uganda, UNHCR

In October 2018 UNHCR Uganda launched the Inter-Agency Feedback Referral and Resolution Mechanism (FRRM). Through the integration of previously siloed complaints and reporting mechanisms such as protection desks, suggestion boxes and community based structures, combined with the establishment of an interagency toll free helpline, this new tool seeks to enhance two-way communications between refugees and assistance organizations. It achieves this by creating a more accountable, better informed, and more responsive protection environment.

Design and development of the FRRM was led by an Inter-Agency steering committee established in May 2018 - consisting of the Ugandan Government, Care International, Oxfam, Save the Children, TPO, UNICEF, UNFPA, UN Women, and WFP - and chaired by UNHCR. This inter-agency approach, and the technologies deployed in the system, mean that the FRRM represents one of the most ambitious and comprehensive strategies for facilitating improved two-way communications and for tackling fraud and corruption used in humanitarian response.

The FRRM helpline, which is based in Kampala, has a team of 12 dedicated agents who speak a total of 16 different languages.

The platform's inbuilt referral network currently host an impressive 489 individual focal points within 38 partner organizations, working across 31 settlements. It allows refugees' queries to be sent to frontline responders at the click of a button.

The helpline is open 8 am – 5 pm Monday to Friday, and is operated by outsourced company TechnoBrain. The helpline has a total of 12 specially trained agents who speak a total of 16 languages. Upon calling, refugees are greeted with an audio recording requesting them to choose their language before being directed to the appropriate agent. The agent then proceeds to transcribe the case into English making it accessible to individual case workers in the field.

Case Study: FRRM Inter-Agency Helpline Uganda, UNHCR

Cases received through the helpline are categorized according to the nature and urgency of the call:

Categories 1-2 are handled directly by the helpline agents, guided by an extensive database of standardized FAQs.

Category 3 requests for assistance are automatically channeled through the mechanism's case management system to preassigned focal points within partner organizations for resolution.

Category 4 cases relate to alleging fraud and corruption, and are channeled directly to the IGO or anti-fraud focal points.

Category 5 cases are serious protection/ life threatening case, and are channeled directly to the head of UNHCR field offices in locations concerned.

All referrals are then tracked through the system's interactive data portal, which allows UNHCR and partners to track individual case status, referral response times, and quality of feedback given. The recent integration of natural language processing software (AI) provides further analysis of calls received.

Since piloting began in October 2018, the helpline has received (as of 13th November 2019) a total of 55,004 calls, and handled 20,258 individual cases. While some 9,092 cases were resolved directly at the call centre level, a total of 11,275 were referred to FRRM focal points (partners and UNHCR) for resolution. A total of 14,762 individual queries have been resolved. With upscaling of sensitization activities ongoing, UNHCR Uganda hopes the helpline will eventually receive in excess of 10,000 calls per month.
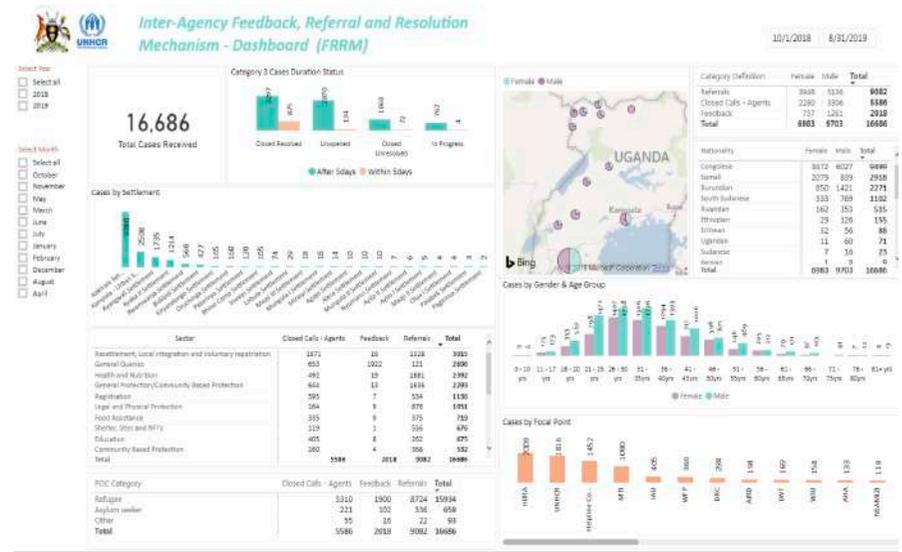
The FRRM public dashboard displays the types of calls received by location, sector, and category, and shows the full AGD breakdown.

Key Takeaways

A total of 55,000 calls were received during the first year of piloting.

9,092 issues were resolved at the helpline level, and 11,275 referrals were made to UNHCR and partners.

489 focal points within 39 organizations currently receive referrals through the platform.

Tip Cards

The humanitarian sector is filled with learnings from past responses by other practitioners. Learn from their experience with these helpful reference cards. Print and share cards that are most relevant to your efforts with your team:

1. Community engagement tips for health epidemics
2. 10 things to know about Data Protection
3. Dealing with difficult callers
4. Getting language right: A case study
5. Operator skills & techniques
6. Information management practices

What tips would you share from your own hotline or contact centre experience?
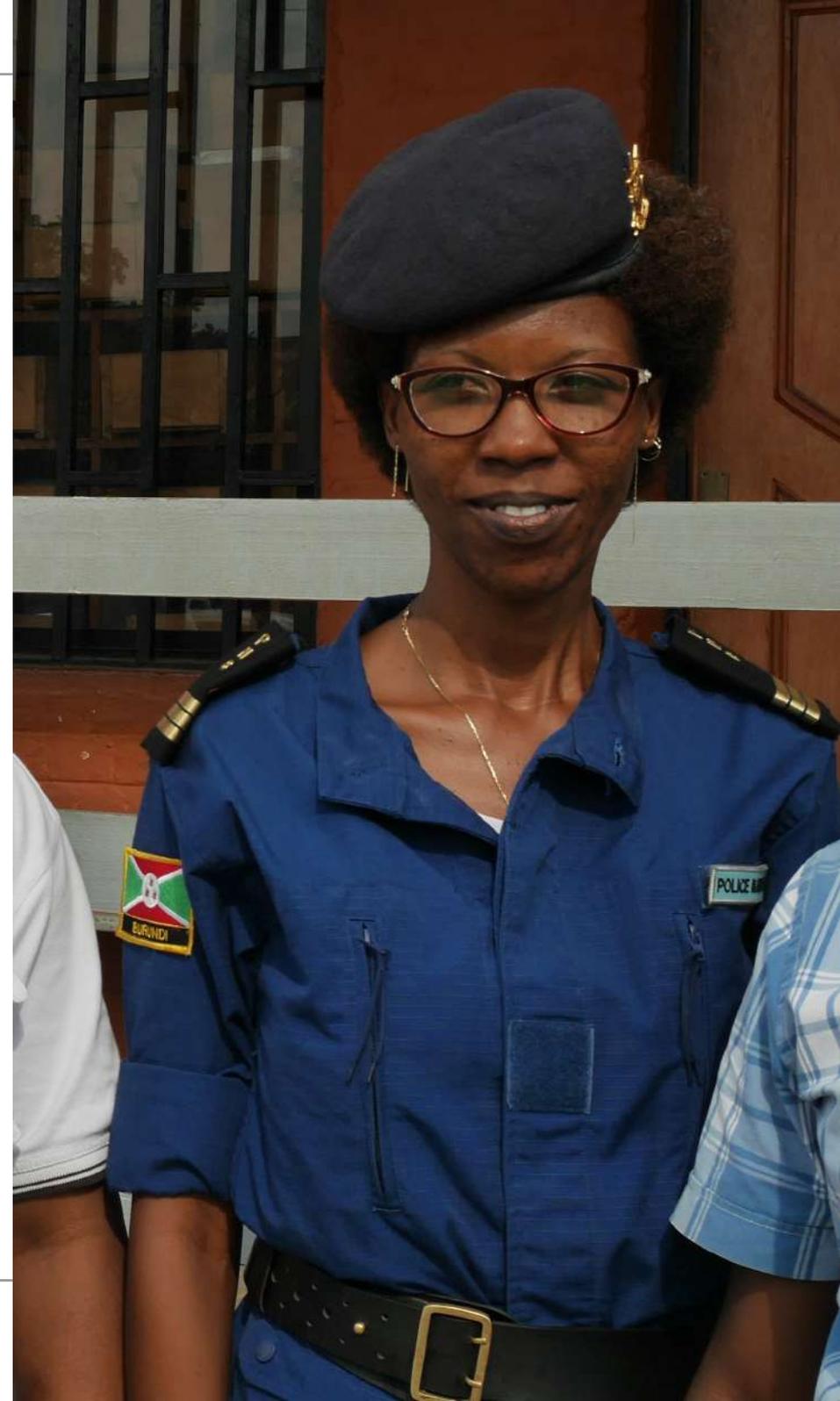
Community engagement tips for health epidemics (1/2)

● **DEFINITION**

Epidemic refers to an increase, often sudden, in the number of cases of a disease above what is normally expected in that population in that area. Pandemic refers to an epidemic that has spread over several countries or continents, usually affecting a large number of people.

With the increase of cases, public fear rising and rumours spreading, it is important that we engage people and communities in discussing solutions and taking effective action to protect themselves, their families and their communities.

● **KEY RESOURCES**

Epidemic control Toolkit
https://ifrcgo.org/ecv-toolkit/

Community engagement tips for
health epidemics (2/2)

Don't only tell people what to do

Recognizing the community as experts is key to tackle the epidemic. Telling people what to do, however scientific, does not always work. Engaging them through two-way communication is more effective and taking the discussion from a top down "don't" to a partnership of "can" with communities is key.

Be open, honest, and timely

Communicate clearly and timely (as recommended by the Ministry of Health and WHO) what we know or not know about the disease and focus on the action that people and communities can take to tackle the disease.

Get peers and leaders to talk

People are more likely to pay attention to information from people they already know, trust and who they feel are concerned about their wellbeing. People live in unique social-cultural contexts, with relationship dynamics, and their own perception of risks, and trusted sources of advice, that influence if they accept health advice or not.

Promote awareness and action

Action-oriented risk communication and community engagement typically contains information targeted to communities, including:

1. An instruction to follow (i.e. if infected, go for treatment immediately)

2. A behaviour to adopt (wash your hands frequently to avoid transmitting the bacteria

3. A response to take (such as going for treatment, following guidance on where and when to access services, i.e. treatment is free of charge and available at health facilities)

Establish participation and feedback approaches

Asking people what they know, want and need, and involving them in designing and delivering disease related services and prevention approaches improve the effectiveness of our community interventions and sustain the changes we promote. It is important to give opportunities and open channels of communication for people and communities to ask questions and debate issues of concern.

Test your approach

Pilot-testing messages and materials with communities aims to ensure that messages are understandable, acceptable, relevant, and persuasive. It will also help prevent the dissemination of either meaningless or potentially harmful information. It should also be noted that too much dissemination may have adverse effects.

10 Things to know about Data Protection (1/2)

01
Do No Harm

Make sure that if you share data, you do so without information that can identify an individual. Sometimes it might be necessary to use less location data in order to not only guarantee the privacy of people, but also to ensure that they can't be identified so that they can remain safe (i.e. only share gender, age range and for example only the province instead of province, district and village).

Check if your organization has a policy on the protection of personal data!

02
Handling Sensitive Data

Keep sensitive data (e.g. complaints on sexual exploitation and abuse) separate from other feedback data – it needs to be referred and shared securely and separately to an assigned focal point.

03
Just Enough Data

Only collect personal data if there is a legitimate reason for doing so, and *only* with the person's consent.

04
Transparency

People need to know how the information they share will be used by your organization. Even more so if you collect any personal or sensitive data.

05
Getting Consent

Those under the age of 13 or 16, depending on the country, cannot provide consent for personal data, so consent from a parent or guardian must be obtained instead.

10 Things to know about Data Protection (2/2)

06

Norms for strorage and access

Have security procedures in place that govern access, storage, and use of the data. Ensure that the software (Microsoft Excel, for example) and hardware (a laptop, storage device, phone, server, etc.) are adequately protected. Lock the equipment when not in use, password-protect the hardware and software, and encrypt sensitive files. Only share password-protected files (unless you have removed all personal/sensitive data).

07

Anonymity

If the data collected needs to be shared with others in your organization or with external partners, make sure it is anonymized, and cannot be traced to specific group of people or community (e.g. an ethnic group at risk).

08

Secure archiving

Delete or anonymise any personal data that is no longer needed.

09

Data breach planning

If data is ever breached, those affected should be alerted and informed of potential risks as soon as possible.

10

More Resources

- **ICRC Handbook on Data Protection in Humanitarian Action:**
  https://www.icrc.org/en/handbook-data-protection-humanitarian-action

- **IFRC feedback starter-kit, includes overall guidance, including on data protection, and templates to collect, analyse and visualize data:**
  https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

Dealing with difficult callers (1/2)

Difficult callers are a common problem on hotlines, especially hotlines with a toll-free number. It is therefore important to develop a policy and train hotline operators to handle such calls. Operators should treat all callers with respect and the appropriate level of sensitivity, even if provoked.

Do Your Best to Solve The Problem Immediately

If you know the solution, fantastic! Dive right in. If you're unsure, don't make any promises that you can't keep. If you don't know the answer, put the caller on hold and consult your manual or other resources as quickly as possible. Remember, an angry caller is only going to get more annoyed the longer he or she sits on hold. If you can't resolve the issue yourself, ask a coworker or manager for help.

If you still can't resolve the issue, explain to the caller what steps you will take to resolve their issue and tell them when you follow up with them. Make sure you follow up as agreed, even if your update is to explain the status of their still unresolved issue. Knowing someone is actively managing the problem will help them be patient.

Hear Them Out

When you do get a difficult caller on the phone, ask how you can help. Then, sit back and listen. Really listen. When a customer is explaining a problem, don't interrupt them at all. Don't even cut in to ask for clarification. As they talk, take notes and jot down follow up questions you'd like to ask after they're finished. Feeling like they're being heard should help calm them down, even though the issue isn't yet resolved.

Apologize for Their Trouble

After they've explained the problem, before anything else happens, apologize. This is key to letting them know you care about their frustration. They'll feel like have an ally, not an enemy. Even if the problem was originally their fault, don't blame them for it or they'll get (or remain) defensive.

Dealing with difficult callers (2/2)

Not all difficult calls are the same. Becoming familiar with different types of difficult callers and their situational context can help hotline operators be more prepared to handle these calls.

Baiting & Trolling Calls

Be wary of entrapment – in politically sensitive contexts, the caller may try to bait operators to say something that could be considered subversive or that incites negative behaviours. In this era of trolling, prominent radio call-in hosts have been baited into making inappropriate, partisan political commentary with the intention of rebroadcasting edited sections on social media. Ensure that operators are aware that anything they say on calls could be repeated or shared publicly.

Repeated Calls

The hotline should consider whether the caller has a legitimate and unaddressed concern or if the caller is intentionally harassing the hotline without an underlying issue. Identify those that incessantly call for no reason. It could be helpful here to create an alert indicating how many times a person has called in the last 30 days.

Abusive Calls

If a caller is abusive or insulting, the operator should acknowledge the caller's frustration and give the caller time to air their concerns before offering assistance. If the caller does not calm down, do not hang up. The operator should instead suggest that the person call back when they are less upset. If it reaches the point where the abusive caller is not cooperating, the operator should seek the assistance of the hotline manager.

Distressed Calls

Many of the callers will be emotionally distressed. It may be difficult for the hotline operator to establish a clear picture of a distressed caller's situation and it is therefore important to listen and let the person unload despair first. Be patient, do not interrupt and detach yourself from the emotional feelings of the caller.

Getting language right: A case study

Language is a Driver of Vulnerability

Getting language right in complex linguistic contexts is no small feat. WFP Mozambique took on the challenge when it rapidly scaled up its hotline from a single-agency line to an inter-agency complaints and feedback mechanism serving the humanitarian response following Cyclone Idai, which made landfall on 15 March 2019.

The design of Linha Verde da Resposta a Emergencia was informed by the language needs of affected populations, with call centre agents representing 12 of the country's 14 languages.

In addition, with 39% of the population being illiterate, Linha Verde used pictorial material to raise awareness of the hotline, especially among female demographics, who only accounted for 16% of total callers in October 2019.

Feedback from women in affected communities identified that the fear of not being understood by, or not understanding, the call centre agent as significant barriers to accessing Linha Verde. It is a language-based fear that WFP is working to address through a range of communication channels, including graphic and audio.

Operator skills & techniques (1/6)

01 Active listening

Active listening is an important communication technique that allows the CFM Operator to show the CFM User that they are listening, they understand their situation, and that they are taking their feedback seriously. It is an important element in building trust between the User and the Operator. Operators should listen without judging, interrupting, or finishing the sentences of the User, allowing them adequate time and space to deliver their message.

Three considerations for active listening:

1. Operators should wait for the User to finish speaking before asking clarifying questions and should only ask questions to ensure understanding. May I repeat what you said so I am fully clear about your situation?

2. If a User has gone off topic, bring them back on track with sentences such as: "That is interesting. Please tell me more about your situation, XX."

3. An operator should show understanding by reflecting the speaker's feelings. What a terrible ordeal. I can see that this was a difficult time.

Non-verbal communication

Non-verbal communication plays an important part when demonstrating active listening, even on the phone. To give feedback to the User, it is important to maintain the necessary contact by using the eyes, other mannerisms such as nodding the head and/or a short 'mmhm' or 'ahh' where appropriate.

Listen to what is not being said

Sense the tone of the person, adapt your tone. It is common for attention to drift during a long day of operating a CFM. If attention slips during an interaction, make a conscious effort to refocus. Write down what they are saying. Imagine you are the User, create a mental image of what they have experienced. Stand up and/or move around. Do what you must do to shift your concentration back to the User. Finally, to demonstrate active listening, an Operator should succinctly summarise the interaction as part of the farewell greeting, such as "Please allow me to summarise your call...".

Operator skills & techniques (2/6)

02 Maintaining patience, control, and attitude

A CFM Operator must demonstrate patience and control at all times; this is of particular importance during a challenging interaction, when a User may be angry, emotional, and/or traumatised. It is important that Operators display empathy while not absorbing the responsibility of the anger or emotion. Remaining calm, Operators should engage with the User and demonstrate active listening (please refer to the relevant resource).

Angry or Abusive Users

To deal with angry or abusive users, the Operator should adopt a calm tone while saying one of the following:

"We are here to help you."

"We are at your service."

"I am sorry this happened to you."

Emotional Users

To deal with emotional Users, the Operator should adopt a calm tone while delivering healing statements:

"I believe you" - This builds trust

"I'm glad that you told me" - This builds a caller relationship

"I am sorry this happened to you" - This expresses empathy

"This is not your fault" - This is non-blaming

"You are very brave to talk with me. We will try to help you"
 - This reassures without making promises.

Nuisance or Prank Users

Nuisance or prank users can be challenging to deal with. An Operator may identify them in the following scenarios:

1. The User asks to talk to a specific Operator for no reason (e.g. the case is not legitimate)

2. The User is flirting or approaching the Operator for inappropriate reasons

3. The same User contacts the CFM repeatedly without reporting specific feedback and instead asks/makes random or inappropriate questions/statements

Operator skills & techniques (3/6)

Nuisance or Prank Users (continued)

The operator can and should report the incidents to their Supervisor with detailed information for monitoring. The Supervisor will review the case and determine if the User is indeed a nuisance/prank User and can take measures to manage this (for example, if a man is hassling a female Operator, a male Operator may be assigned to tend to their case). Some statements that can be used to keep the User on track and/or deflect further nuisance are below:

"The requested Operator is not available, may I take your case instead?"

If the User insists to talk to the requested operator follow the next script:

*"Mr./Mrs. ***** We know you have contacted our centre for the following issues ****, if you have any other questions or comments it would be my pleasure to assist you."*

"All of our Operators are equipped to handle cases equally and if you need to share any information it would be my pleasure to assist you."

"Unfortunately, the requested operator is busy with other calls; please feel free to contact us again when you feel comfortable to share your information with us. Thank you."

Operator skills & techniques (4/6)

03 Handling sensitive cases (including those requiring specialised support services)

Quality assurance of sensitive cases, including requests for psychosocial support, reports of gender-based violence (GBV) or sexual exploitation and abuse (SEA), as well as reports of serious physical threat is particularly important as in these circumstances, Users are particularly vulnerable and therefore the potential risk for Operators to cause unintended harm is higher.

Users seeking specialised support services can be offered three types of services (if they exist in the area): legal, health and psychosocial support. Additionally, it is important that for these cases the User determines what happens to their case. The Operator may present three options:

> 1. The Operator provides the caller with the relevant number/address/information so that they can contact the available service provider themselves
>
> 2. The Operator can offer to contact the service provider on their behalf
>
> 3. The Operator does nothing and is just there to listen

CFM Operators are usually not specialised case managers; when dealing with sensitive calls they should not seek to gather any extra information that the User is not sharing voluntarily. The Operator should be empathetic and employ active listening techniques to allow the User to tell their story (if they choose to tell it). The following boxes are main considerations in the reception and treatment of such cases.

Confidentiality & Respect

The Operator should inform and make it clear to the User that their information will be shared only with their consent and only with the relevant agencies that can provide the assistance requested and agreed by them. Operators must keep the interaction confidential and immediately flag it to their Supervisor.

The personally identifying information of a case should never exist in the same document as the details of the case unless password protected.

Additionally, the operator must respect the User's choices. The Operator should give required information to the User and allow them to decide how their case is handled.

Operator skills & techniques (5/6)

Safety & Security

The Operator's main priority is the safety and security of the User. The Operators' advice or indications should not put the User and their family in further danger.

The Operator must give all needed/critical information in the first interaction to avoid requiring further contact at a later time/date in case this action may put them in further harm.

If the User wishes to tell the Operator about a specific incident, the operator should take note and use active listening techniques, showing empathy but the Operator should not ask probing questions. This may do more harm. This is the responsibility of a trained specialist.

Healing Statements

The Operator may use any of the following healing statements in dealing with sensitive cases:

> *"I am glad that you told me, this is not your fault."*

> *"I am very sorry this happened to you. Help is available for you."*

> *"I am very sorry you are going through this."*

> *"I believe you."*

Non-Discrimination

The Operator must provide equal treatment and assistance to every woman, man, girl, or boy who reports violence, regardless of their gender, religion, culture, origin, ethnicity, refugee status, or nationality.

Operator skills & techniques (6/6)

A Note About Sexual Exploitation & Abuse

The Operator informs a User who wishes to report attempted or actual sexual exploitation and abuse that, as a humanitarian organization representative, we are obligated to report the incident (with or without the User's consent). We do not have to share personally identifying information, but we must report it.

> *"It is important for you to know that confidentiality is key. I will only share your contact information with your permission. Humanitarian aid is free. All humanitarian workers adhere to code of conduct. If a humanitarian worker has tried hurt you, we can report this incident and protect you from any further harm. I would like to advise you that I am obligated to report cases of abuse of power through a very confidential protocol. Details of the incident will only be shared with your permission, but the incident must be reported. I can tell you more about the process if you wish. We pass on the report (without identifying information if you do not consent to having your information shared) to relevant actors who will investigate the matter. Perpetrators will be held to account."*

In addition to this, operators should apply the same principles for healing and servicing the needs of the affected individuals as with GBV.

For more information on handing cases of GBV and SEA, please refer to the dedicated corporate resources on these matters.

Information management practices (1/5)

01 Information management strategy

Understand the Requirements

Map all the information flows and put them all in a table. What kind of information should be coming in (i.e. data collection mechanism, reports from partners), and what should be going out (i.e. reports, data sets, visibility materials)? What information travels internally (i.e. during data processing or preparation)? Do not over-think this; include clear descriptions and keep the mapping holistic.

Make a list of the most important information requirements for operation. Is data security a primary concern? Will you need to have multiple data controllers (people working directly with the data)? Will you need to collect data offline (in the field without internet)? Are there any crucial indicators you will need to report on to donors? Keep this list to the most essential requirements only; try not to get carried away in the details.

Choose Your Tools Wisely

1. Consider free or open-source solutions - Alternatively, investigate license packages you may already have (such as Microsoft Office 365) and try to use the tools already available to you. You may not need something fancy or expensive to meet your minimum requirements.

2. Make sure the different tools used to capture, store, manage and disseminate your data are compatible, not just in speaking to each other but potentially also for integration with partners' tools. Are the tools you want to use also used by others? Speak to as many people as you can about what would make the most sense; focus on your partners.

3. Make a list of all the tools you will use for each stage of the IM cycle: data capture & management, data preparation & analysis, data visualisation & reporting. Adapt your cycle to what makes sense for your operations; maybe you have separate tools and procedures for capture and management, or a separate stage for data cleaning.

Information management practices (2/5)

Get With the Program

Streamline the data cycle into the program cycle. You can start by making sure everyone in the team is aware of what IM is, and how it contributes to achieving the objectives of your CFM. You will be surprised by how quickly good IM practice can spread within the organisation.

Monitor IM activities like any other activity. Keep track of roles and responsibilities, perform regular reviews, and have contingency plans for when things go wrong.

Compile Your Strategy & Support with SOPs

Your strategy should include all that's been stated, as well as any other major considerations for your operation and be regularly maintained by one person. Ideally, you want a dedicated information management person to do this.

SOPs are separate and necessary supports for this IM strategy. SOP documents to consider, for example, would include step-by-step procedures for: data collection, data cleaning, case referrals, reporting, and any other significant activities, such as dealing with sensitive complaints. It is imperative that these are kept up to date; make sure the SOPs are simple and straight-forward to keep this maintenance light, but they should also act as a proxy induction/handover tool.

Information management practices (3/5)

02 Data collection and management

Less is more

Start with the basics when collecting data and work up from there. You need to keep it simple in order to keep the process efficient and accurate.

Practice makes perfect

Test the tools thoroughly and try to have a pilot. Train the data collectors/enumerators iteratively as you encounter new issues. Make sure the language is appropriate for being understood by both the data collectors and the data subjects.

Cover your bases and archive

1. Have a convention for file naming and storage that everyone understands. Ensure these conventions make your lives easier (for searching/finding documents), not harder.

2. Know what the procedures are for each stage in your data cycle (different from your IM cycle – see above): Create, store, use, share, archive, destroy. How will data access rights change when you go from one stage to another? How long will you keep data, and how do you intend to destroy it (if at all)?

3. Keep a log of major reviews, changes and file versioning of important documents and/or tools. This change log only needs to capture who made a change, why, what the change involves and when it was made, and should only really be used for larger review processes.

Information management practices (4/5)

03 Data preparation and analysis

Keep original files

Working files should always be copies of original files. This not only preserves raw data but allows for effortless file versioning.

Collaborate as much as possible

Analysis of standalone data is useful, but triangulated data is much more powerful. Share your data, look at other data, and identify overlaps that might provide special insights.

Keep track of your preparation steps

Document what is done to the raw data to get it into the state for analysis or sharing. The easiest way to do this when using Excel is to use Power Query, which tracks your preparation steps automatically.

Do the hard work

When sharing prepared or analysed data, break it down for the end user (partner, colleague, donor) so that the file and tables are easy to use. If asked for raw data, provide a basic summary and perform some calculations to deliver key figures; this is not only hugely appreciated by the end user, but it also reduces the risk for accidental manipulation or misrepresentation of the data.

Information management practices (5/5)

04 Reporting and visualization

Know and present your data

Management, preparation and analysis of data should provide the data controller, or dedicated IM person, with solid knowledge of the trends and outliers in the data. This needs to be adequately communicated and shared internally within the team to ensure everyone is kept up to date.

Physically present your data as much as possible. There is nothing more effective than your body in a meeting room, ready to provide contributions that are timely and well-understood. This helps maintain relevance of your programs as well as allows for direct comparison of knowledge.

Keep it simple and make it sexy

When reporting or visualising information, focus on the headlines and make them attractive to the eye. If possible, create interactive dashboards or reports with infographics to maintain reader attention. If you have piqued someone's interest, they can always get in touch for a more detailed breakdown of the data.

Never miss a deadline

Stay consistent with reporting deadlines and try to maintain presence regularly at coordination meetings. This will ensure your data is always part of the conversation.

Adopt feedback

Regularly ask for feedback on the usability of your data, whether shared verbally or in digital format. Absorb feedback into regular review rounds and always remember your data is worthless until it becomes useable information.