



Tip Cards

- **ABOUT THESE RESOURCES**

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 storage 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).

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.

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."

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.

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.

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."

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 handling 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 straightforward 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.