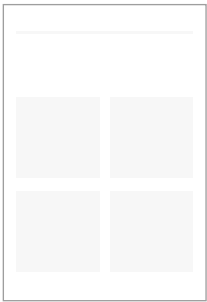# Assessment

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.
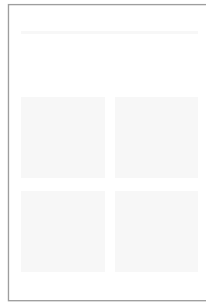
● **IN THIS WORKSHEET**

*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**
Consider your audience
and key ecosystem
characteristics
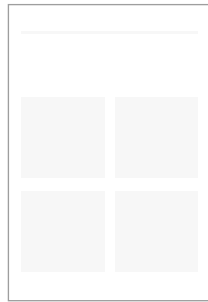
**B.** Assessing the
**Communication
Landscape**
Which modes of
communication does your
audience rely on? Which
are feasible locally?

**C.** Assessing the
**Operational Feasibility**
Consider your core
capabilities and
operational constraints

# 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

○ Guarded

○ Trusted

○ 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*
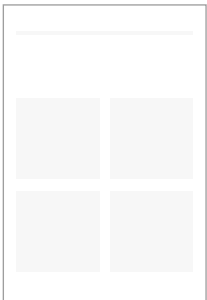
# Definition

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.

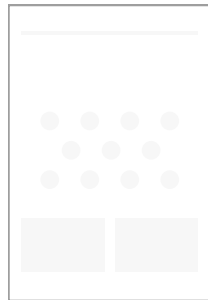# Define and Plan Your Response

● **PURPOSE OF THE WORKSHEET**

Support the key decisions needed to define a channel to communicate with communities.
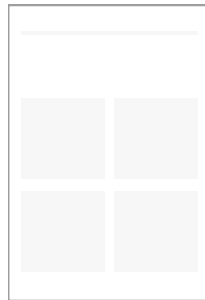
● **IN THIS PACKET**



**Define Your Purpose and Scope**
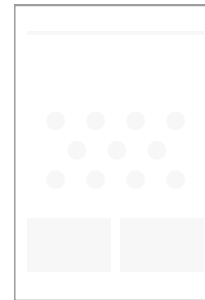Clarify your goals and what's in scope and not



**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 <u>WILL</u> 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 <u>NOT</u> 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
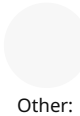
SMS Blasts

Messaging Apps

Social Media Announcement

Other:

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

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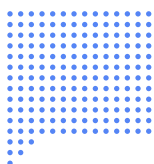
On the following page, write up your mission statement using these worksheets. You can print this sheet and hang it proudly in your contact centre for all to see.

## 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 |
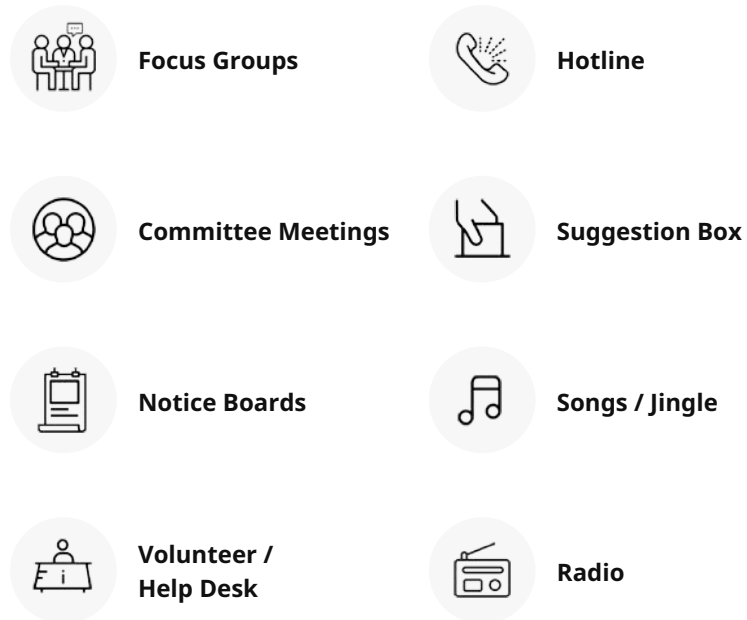
● **DIGITAL CHANNELS**

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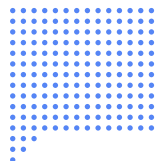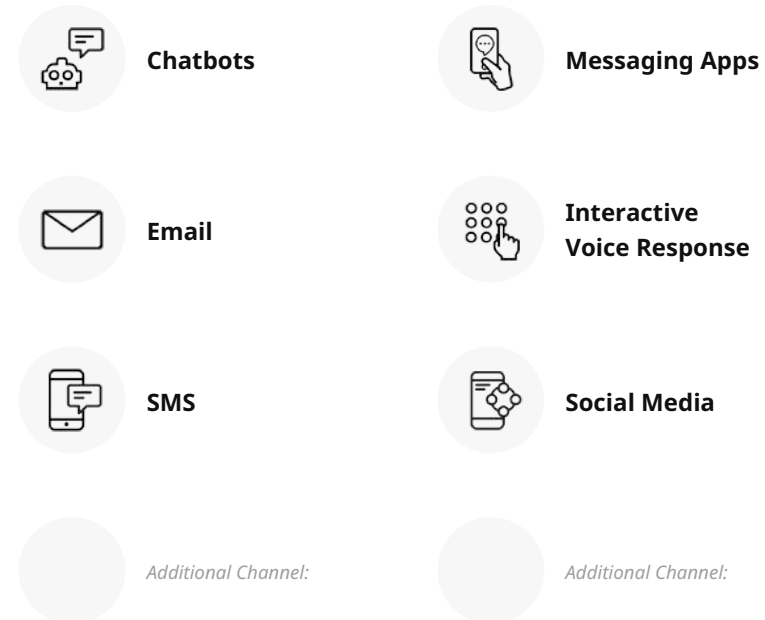
This is a select list of channels used in humanitarian response and is not exhaustive. It does not include any proprietary systems, programs, or databases or get into details about specific social media platforms.

# Channel Directory

| ● CHANNEL | ● STRENGTHS | ● WEAKNESSES | ● TIP |
|---|---|---|---|
| **Focus Groups** | • Qualitative feedback and anecdotes can be a powerful way to summarize issues or gauge future impact<br><br>• Can also serve capacity building and outreach functions depending on how discussion is structured<br><br>• Low cost | • Typically limited to small groups (8-10 people), so scope is narrow and not necessarily representative of the larger population<br><br>• 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<br><br>• Select a private space for hosting your group so the atmosphere feels friendly and safe |
| **Notice Boards** | • Effective for simple and complex messages<br><br>• Available to those without phones or other technologies<br><br>• Low cost | • Limited geographic coverage<br><br>• May exclude illiterate people<br><br>• 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<br><br>• To include illiterate people, ensure messaging is graphic |
| **Help Desks** | • Supports face-to-face communication, which many prefer<br><br>• Provides immediate feedback in most cases<br><br>• Possibly more accessible as it serves people in the immediate location<br><br>• Allows for targeted feedback on a specific services | • Hard to sustain over time – typically, once the service has ended, the help desk ends<br><br>• May exclude people that do not feel comfortable with giving in-person or non-anonymous complaints<br><br>• 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<br><br>• Staff must be trained to answer frequently asked questions, record feedback, and follow up with issues they cannot immediately resolve |

# Channel Directory

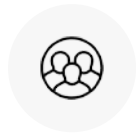| CHANNEL | STRENGTHS | WEAKNESSES | TIP |
|---------|-----------|------------|-----|
| **Suggestion / Complaint Box** | • Enables communities to provide anonymous feedback<br><br>• Available to those without phones or other technologies<br><br>• Low cost | • Requires writing materials, which aren't always available<br><br>• Difficult for illiterate people<br><br>• Often not trusted by community members since they do not know who will access information<br><br>• May cause security issues for communities | • Box must be accessible —at a central location, at a reachable height<br><br>• Requires staff to check messages frequently to drive trust that feedback is being received and handled<br><br>• Ensure messages received in box remain secure and confidential |
| **Committee Meetings** | • Community ownership and oversight of program reduces risk<br>• Direct interaction with communities<br><br>• Versatile: adapted for both accountability and compliance<br>Encourages sustainability<br>Low cost | • Reinforces existing power structures in communities and may lead to exclusion of less powerful social groups<br><br>• 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<br><br>• 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<br><br>• Large geographic and audience reach, including illiterate people<br><br>• 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<br><br>• Usually low cost | • Excludes those without access to a radio<br><br>• 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.<br><br>• Radios can often be distributed by humanitarian partners, or through persons of concern as a livelihood activity. |

# Channel Directory
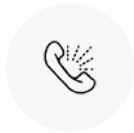
| ● CHANNEL | ● STRENGTHS | ● WEAKNESSES | ● TIP |
|---|---|---|---|
| **Call centre/ Hotline** | • Good for providing a rapid response, especially across a large physical area<br><br>• Inclusive across a broad range of audiences (men, women, age groups, locations)<br><br>• Versatile: can be used for both accountability and compliance<br><br>• 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<br><br>• May exclude people without phones or those in an area with poor mobile coverage<br><br>• May exclude those who cannot afford to call, if the line is not toll free<br><br>• Requires significant outreach/sensitization efforts | • Hotlines require dedicated staff and continued effort to coordinate information exchange, referrals/response, and information management<br><br>• It is important to be aware of all the legal requirements to operating a hotline before launching one<br><br>• 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<br><br>• Good for broadcast messaging to large groups of people across a wide physical territory<br><br>• Rapid, and especially useful as an alert system<br><br>• Messages can easily be sent<br><br>• In different languages and therefore supports multi-lingual scenarios with less effort than other channels<br><br>• 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<br><br>• Messages have a character limits, so message content must be succinct and may lack depth or context<br><br>• Cannot determine if received messages were well-understood | • Requires budget and/or agreements with local telcos,although negotiation may make this quite affordable<br><br>• 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<br><br>• Supports information dissemination across a wide range of topics, and can also support several layers of depth for more specific information<br><br>• May be especially good at providing information people are embarrassed to ask about in person, such as sexual health<br><br>• 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<br><br>• Callers may find it frustrating to not speak with a live person<br><br>• 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<br><br>• International: requires a connection to wifi or mobile data, but may work across countries, which is especially good for migration scenarios<br><br>• More conversational in nature and often leads to group discussions and sharing<br><br>• Very popular with youth | • Requires moderation to ensure rumors and bad information do not spread quickly<br><br>• Can be time consuming to manage/respond<br><br>• Can be difficult for data collection<br><br>• 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<br><br>• Privacy and data security issues need careful consideration<br><br>• 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<br><br>• Works especially well in regions with high smartphone use, readily available free wifi, and advanced digital habits<br><br>• Multi-media: can send text, pictures, audio and video files, maps and documents<br><br>• International: requires a connection to wifi or mobile data, but may work across countries, which is especially good for migration scenarios<br><br>• More conversational in nature andoften leads to group discussions and sharing | • Requires moderation to ensure rumors and bad information do not spread quickly<br><br>• Can be time consuming to manage/respond<br><br>• Can be difficult for data collection<br><br>• 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<br><br>• Privacy and data security issues need careful consideration<br><br>• 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<br><br>• Supports information dissemination across a wide range of topics, and can also support several layers of depth for more specific information<br><br>• May be especially good at providing information people are embarrassed to ask about in person, such as sexual health<br><br>• Integrates with popular social media, such as Facebook Messenger, and therefore reduces the need for users to install or learn new software<br><br>• 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<br><br>• Callers may find it frustrating to not speak with a live person<br><br>• 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<br><br>• Always have a guardian to prevent abuse of the system<br><br>• 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
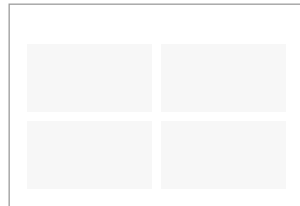
● **PURPOSE OF THIS WORKSHEET**

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**
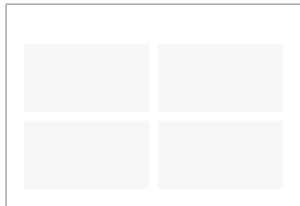
**Coordination**
Plan your coordination response for key issues

**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 | ● CONTACT PERSON | ● REFERRALS & VERIFICATION |
|---|---|---|
| What are the currrent or planned programs that your contact centre needs to know about? | Who is the main contact person at these organizations/programs? | 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.
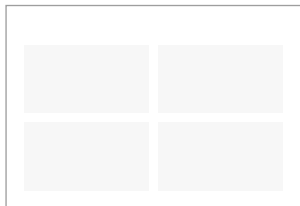
# Contact Centre Evaluation

● **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.
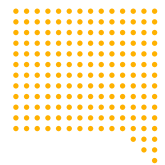
# Contact Centre Roadmap

● **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*