

# South Dakota National Guard



## Family Readiness Group Telephone Tree Handbook

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All other editions are obsolete

State Family Program Office  
1-800-658-3930  
[familyprogram@sd.ngb.army.mil](mailto:familyprogram@sd.ngb.army.mil)

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## INTRODUCTION

This handbook contains guidance, forms and examples to assist Family Readiness Groups (FRG) and units in the development and maintenance of their FRG telephone trees.

For questions or assistance call the State Family Program Staff at 605-737-6089.

If you are completing this handbook as training to become a Family Readiness Group Telephone Tree Key Caller, be sure to complete and return the Certificate of Completion at end of this handbook to the State Family Readiness Office -  
ATTN: FRSA, 2823 W Main St, Rapid City, SD 57702.

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## **Communication Process**

Timely and accurate information is imperative to keep Families abreast of happenings within the unit in order to limit confusion and stress. Various types of calls are made to pass information to Families depending on the situation. These calls are made through an organized system called the telephone tree.

### **What is a Phone Tree?**

The Telephone Tree is a system that enables callers to quickly and accurately disseminate information to Families thereby limiting rumors and undo stress. It is used in emergencies, to limit rumors, make wellness checks, and to build rapport with unit Families. It is one of the most important and useful tools a Family Readiness Group can develop and maintain.

### **What are the Goals of the Phone Tree?**

Goals of an effective FRG phone tree are: the tree enhances a sense of belonging and provides needed information, including news about upcoming FRG events and the unit's status. It also gives Families a secure feeling that there is someone to talk to during Family emergencies or someone that they can express their concerns to. A well run phone tree helps improve the quality of life and morale of the unit. Leaders – both military and volunteer – who know their service members and Families develop a greater understanding of their needs and are better able to assist and support them. Moreover, when the service member witnesses a consistent level of support for their Family, they are better able to focus on their mission.

### **Required by Regulation**

Telephone Trees are to be established by regulation. Refer to: Forces Command (FORSCOM) 500-3-3, Task 2-1-21b.; Army Regulation 608-1, Appendix J-2d.; Army Regulation 600-20, paragraph 5-10a. (b). and Operation Ready, pages 29, 41-42. (See appendix)

Telephone Trees are a critical unit task reviewed during unit inspections which help to indicate if a unit has a viable Family Program. Inspectors review the Phone tree to see if it has been developed, if it is current, and if it is periodically tested. After testing the phone tree, record test date on phone tree filed in the unit's Family Readiness binder under TAB 3.

### **How to Develop Your Telephone Tree**

The telephone tree system is developed from service member Family information sheets (SD National Guard Form 600-12-11 – see appendix of this handbook). In order to keep the phone tree manageable and to minimize calling time when the phone tree is activated, each service member will have only **one** contact on the phone tree (the contact they indicate on their form). This helps ensure timely dissemination of information to Families.

However additional contacts per service member can be added to email and newsletter rosters. Additionally, each Family is encouraged to develop their own personal phone tree (see appendix of this handbook) so once an informational call is received they will have the numbers readily available to call and update other Family members.

Phone trees can be built according to platoons/squads, divided up alphabetically or preferably established based on geographic location to minimize long distance calls. Also if possible, to expedite calling, limit 6 to 8 Families per calling group depending on the unit's size.

It is imperative to get Family's home, work and other alternate points of contact to include email addresses to ensure each Family can be contacted.

Also recommended, assignment of an alternate primary key caller in the event the primary key caller is not available when the tree is activated.

### **How Does It Work?**

Calling is initiated by the unit commander, lead volunteer or State Family Readiness Office when important information needs to be disseminated in an emergency or a routine change of unit events. However, in the case of a critical incident (discussed later), the State Family Readiness Office would be the only ones making those calls.

Additionally, an informal test of the telephone tree by the Family Readiness Group should be conducted periodically to ensure it is current; rehearsal provides confidence that the system works. To avoid personal cost, calling cards are available from the State Family Readiness Office.

### **Where to File Your FRG Phone Tree?**

Once telephone trees are completed, file a copy in the unit Commander's Family Readiness Binder under TAB 3 and send a copy to the State Family Programs Office. The unit commander and Lead Volunteer have oversight responsibility for the telephone tree completion at the unit level and the State Family Programs Office has overall oversight responsibility for each unit within the state.

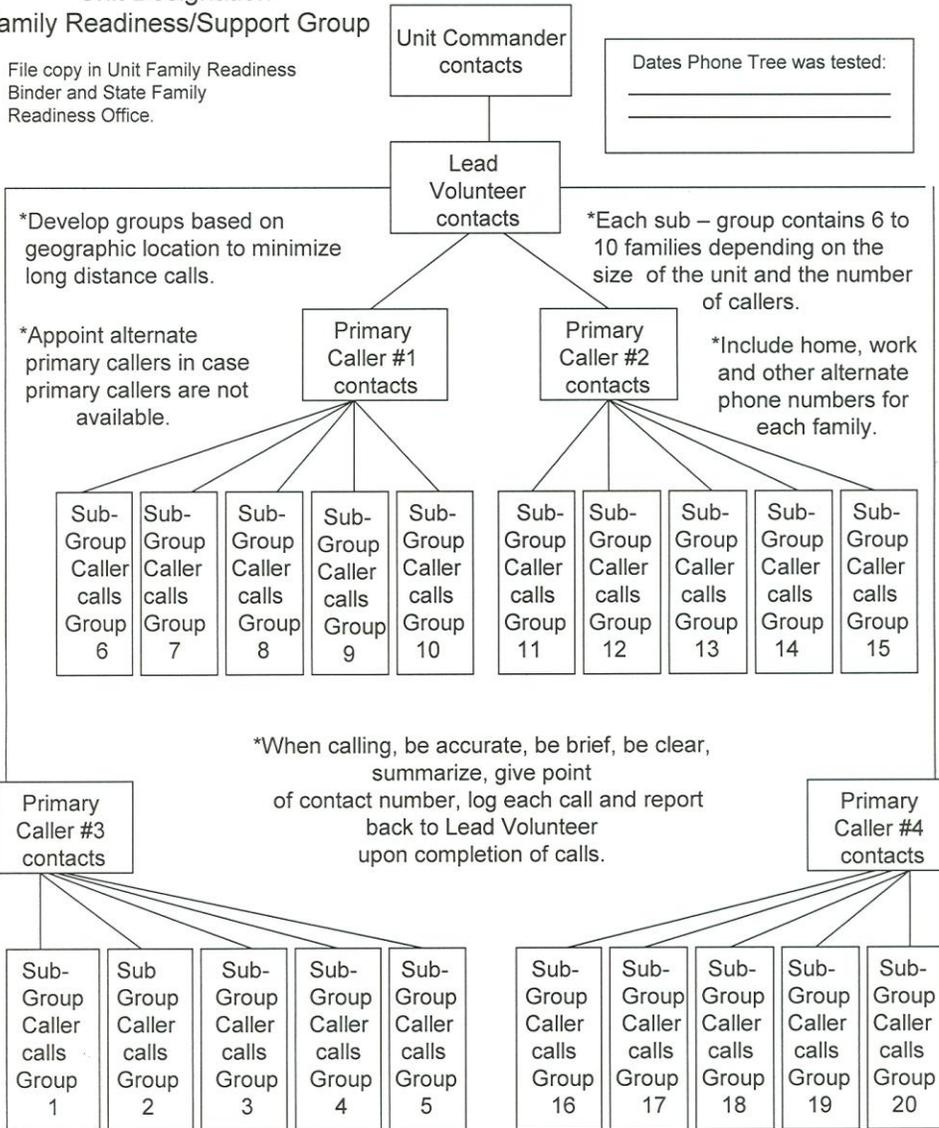
### **How to Pay for Calls?**

Calling cards are available from the State Family Readiness Office. Reimbursement for calls (to include cell phones) made through the State Family Programs Office is another option. Reimbursement requires a copy of the phone bill with the calls made in support of the FRG highlighted and attached to South Dakota National Guard Form 600-12-8R (telephone cost reimbursement). (See appendix of this handbook.) Once form is completed, submit with telephone bill to the State Family Programs Office for reimbursement.

# South Dakota National Guard Family Readiness Telephone Tree Handbook

## Telephone Tree EXAMPLE Unit Designation Family Readiness/Support Group

As of date:



1. Each sub – group caller reports back to the primary caller after reaching the families in their group.
2. Primary callers report back to lead volunteer.
3. Lead volunteer reports to commander that phone tree has completed contacts.

**Ensure Privacy and Confidentiality of Family Member Information.**

As a rule, to protect families' personal data from unauthorized use, only a few key FRG leaders should have a complete copy of the FRG membership roster or the phone tree. Sensitive information should be omitted, too; careful control of all copies of the rosters must be exercised at all times. All leaders must ensure that FRG rosters and phone trees are not given to any third party. Obsolete copies must be collected and destroyed and when a key caller or leader moves or leaves the job, copies must be turned in.

**Types of Telephone Tree Calls.**

The types of calls associated with the telephone tree system are:

- a. Phone Tree Calls
- b. We Care Calls
- c. Critical Incident Calls

We will define each type and discuss their differences in the following paragraphs.

### Phone Tree Calls

Normally, phone tree calls are initiated by the unit commander or Lead Volunteer when information needs to be disseminated to Families. This information can vary in nature, but usually when the phone tree is utilized time is a factor. Some examples of information would be a change in the unit's arrival time at home station or a change in meeting time for Families for a unit Family briefing.

Once the tree is initiated, the lead volunteer contacts the primary key callers for each pre-established group. Then the primary key callers contact the Families in their group. Calling continues until all Families are contacted. Upon completion of all calls the primary key callers notify the unit's lead volunteer who then follows up with the commander if he/she initiated the system. The commander or rear detachment in the event of mobilization should always be informed of phone tree activation so they have situational awareness of the FRG activities.

### Tips for Phone Tree Calls

1. Always immediately **identify yourself** and the unit FRG.
2. Ask if it is a **convenient time** to talk.
3. **Use a script.** Issued to each key caller by the lead volunteer or phone tree chairperson. Ensures every Family receives the same information and keeps the caller focused.
4. **Be Brief.** (try to keep calls to 5 minutes) Remember you have information to quickly disseminate to your entire group.
5. **Be accurate.** Stick to the facts in the script, do not give your opinion and avoid "what if" questions.
6. **Be clear,** be positive, and listen.
7. **Summarize.** To recap information given in the script and to ensure it was understood.
8. **Ask** if they have any questions that pertain to the subject of the call.
9. **Give them a point of contact number (Family Assistance # 1-800-658-3930).** Should they have further questions or concerns.
10. **Keep a log of calls.** This ensures accurate follow up for Families called is given when reporting back to the lead volunteer/telephone tree chairperson after the completion of calls.
11. Never **gossip** or repeat rumors.
12. Do try more than once to call a Family if there is no answer the first time, 3 times is a good number before leaving a message on their answering machine. However, depending on message it is ok to leave a message the first time and provide a call back number should they have questions. Report back to your primary caller that you were unable to reach the family or left a message.
13. **Ensure your calls are completed in a timely manner.** If you are unable to make your calls, make your primary caller aware of this so those families are contacted.

14. **Ensure necessary follow up is completed.** To ensure any information or assistance that was requested by Families during calls was addressed.

### **We Care Calls**

We Care Calls are normally made during periods of **mobilization**, **however they can be done periodically during non mobilization to build rapport with unit Families and to test the phone tree** (as determined by the FRG). They focus on the well-being of Families identifying concerns or problems that may require outside resources or follow up. Further, they ensure that each Family is reached and regular contact with the FRG is maintained.

The calls may last longer than 5 minutes and are more relaxed than Phone Tree Calls. They don't necessarily require a script, but one may be used if there are some specific questions or information that the FRG wants to disseminate. Upon call completion, key callers notify the Lead Volunteer/telephone tree chairperson to inform them of any problems or concerns that were identified.

We Care Calls are usually scheduled once a month (during mobilization) differing from Phone Tree Calls which are only initiated by the Commander, Lead Volunteer or State Family Readiness Office and are scripted.

### **Tips for We Care Calls**

1. Always immediately **identify yourself** and the unit FRG.
2. Ask if it is a **convenient time** to talk.
3. **Use a Script.** If one is required to disseminate specific questions or information by the FRG. Issued by the Lead Volunteer.
4. **Make the family member feel comfortable.** Build a rapport.
5. **Listen, Listen, Listen.**
6. **Be positive, be clear.**
7. **Keep a log of calls.** This ensures accurate follow up for Families called is given when reporting back to the lead volunteer/telephone tree chairperson after the completion of calls.
8. **Have a list of resources available.** (If they have questions or concerns or need a referral, remember you are not a counselor)
9. **Give them a point of contact number (Family Assistance # 1-800-658-3930).** Should they have further questions or concerns.
10. **Summarize.** To recap information given (in script if used) and to ensure it was understood.
11. Never **gossip** or repeat rumors.

12. Do try more than once to call a Family if there is no answer the first time, 3 times is a good number before leaving a message on their answering machine. However, depending on message it is ok to leave a message the first time and provide a call back number should they have questions. Report back to your primary caller that you were unable to reach them or left a message.

13. **Ensure your calls are completed in a timely manner.** If you are unable to make your calls, make your primary caller aware of this so those families are contacted.

14. **Ensure necessary follow up is completed.** To ensure any information or assistance that was requested by Families during calls was addressed.

### **Critical Incident Calls**

Critical Incident calls are **only** made in the event of a death(s) or injury(ies) of (a) service member(s). The State Family Programs Office has a team of designated and trained callers who will make the calls to unit Families once authorization has been received from the State Personnel Office (J1) upon verification that the immediate Family(ies) has(ve) been notified by the notification team. The notification team goes directly to the affected Family(ies) door to notify of their loss.

The State Family Programs Office is the **only** ones who would make these calls. Due to the sensitive nature and extreme seriousness of the message, the State Family Readiness Office designated calling team will utilize a calling script approved by The Adjutant General (TAG) or the TAG's representative.

The State Family Programs Office requests that unit Families **do not** speak to the media during the first hours after an incident or until the information has been officially released. This is requested to ensure the affected Family's privacy and to respect their right to notify extended Family and friends to ensure they do not hear or read about the incident before being personally contacted.

Calls from the State Family Programs Office are **only** made to the affected unit's Family Readiness Group members after Family(ies) of deceased/injured service member(s) have been notified.

### **Phone Tree Callers**

Phone tree callers should be reliable, good listeners, possess a positive attitude and must understand how to maintain confidentiality. They also must provide accurate information and keep accurate records of calls.

The phone tree is designed for communication and support. You are not a social worker or a welfare agency so please do not feel badly if you don't know or don't have the answer. There are many resources and helping agencies available for referral that will be able to provide the needed assistance. **Confidentiality** plays an important part in your position as a phone tree caller. When a Family member tells you something, it is your obligation to maintain their privacy; only sharing their information with the FRG Lead Volunteer/telephone tree chairperson or Family Assistance Staff to ensure their needs are met.

### **Tips for Key Callers**

#### **DO**

- be pleasant when you call
- be friendly and tactful in guiding callers to successful resolution of their own problems
- ensure, when necessary, follow up is completed
- try more than once to call a Family if there is no answer the first time (try at least three times)
- maintain confidentiality and privacy
- refer

#### **DO NOT**

- take it personally if a caller is rude or obnoxious
- feel guilty if you are unable to help them, do your best, refer them
- go beyond your own limits in providing assistance
- gossip or repeat rumors

**VOLUNTEER POSITION DESCRIPTION  
SOUTH DAKOTA NATIONAL GUARD  
FAMILY READINESS PROGRAM  
-TELEPHONE TREE CHAIR PERSON-  
Revised: 07/2011**

I. **Introduction.** The telephone tree chair person is a statutory volunteer serving in an official capacity in direct support of the National Guard Family Programs. The Chairperson works in concert with the FRG Lead Volunteer to ensure the FRG's Phone Tree is created, maintained, and tested.

Depending on unit size, maintenance of the phone tree may take two to four hours per month during deployment and perhaps thirty minutes to one hour monthly during non deployment.

For further guidance/support contact the State Family Programs Office at 605-737-6089 or familyprogram@sd.ngb.army.mil.

II. **Chain of Command/Concern.** Accountable to the Unit Commander or Rear Detachment, FRG Lead Volunteer, and Higher Headquarters.

III. **Qualifications Sought.**

- A. Good organizational and people skills
- B. Excellent telephone / communication skills
- C. Concern and empathy for others; calm under stress, positive attitude
- D. Maintains confidentiality and privacy
- E. Willing and able to take appropriate training for the position and update periodically
- F. Complete volunteer application process

IV. **Major Responsibilities.**

- A. Creates the unit telephone tree from the service member Family information forms (SDNG 600-12-11) completed by the service members.
- B. Files completed phone tree in the unit commander's Family Readiness binder under TAB 3 and sends a copy to the State Family Readiness Office.
- C. Ensures each service member has one contact on the phone tree as indicated on their Family information form (SDNG 600-12-11).
- D. Recruits Phone Tree Key Callers.
- E. Ensures phone tree key callers have calling cards (if needed) provided by the State Family Readiness Office.
- F. Updates phone tree with new unit Families and any changes found when making calls, remove those who leave the unit.
- G. Coordinates testing of the FRG phone tree at least annually and records test date on phone tree filed in the unit's Family Readiness binder.
- H. Forwards calling script created by Lead Volunteer to key callers.
- I. Fields calls from phone tree key callers with questions.
- J. Keeps a log of calls made and received and their results.
- K. Reports any problems, concerns or questions reported from phone tree key callers from Family members to the FRG Lead Volunteer who then reports them to the State Family Readiness Office, 1-800-658-3930.
- M. Ensures necessary follow up is completed for those Families requesting information or requiring assistance.

**VOLUNTEER POSITION DESCRIPTION  
SOUTH DAKOTA NATIONAL GUARD  
FAMILY READINESS PROGRAM  
-TELEPHONE TREE KEY CALLER-  
Revised: 7/2011**

I. **Introduction.** A telephone tree key caller is a statutory volunteer serving in an official capacity in direct support of the National Guard Family Program. A Telephone Tree Caller calls Unit Families on their assigned portion of the phone tree to pass important unit/FRG information.

Depending on the number of families assigned to you, normally 1 to 2 hours each time the phone tree is activated.

For further guidance/support contact the State Family Readiness Office at 605-737-6089 or familyprogram@sd.ngb.army.mil.

II. **Chain of Command/Concern.** Accountable to Phone Tree Chairperson, FRG Lead Volunteer, and Unit Commander.

III. **Qualifications Sought.**

- A. Excellent telephone / communication skills
- B. Concern and empathy for others; calm under stress, positive attitude
- C. Maintains confidentiality and privacy
- D. Willing and able to take appropriate training for the position and update periodically
- E. Complete volunteer application process

IV. **Major Responsibilities.**

- A. Completes Phone Tree training prior to making calls to unit Families.
- B. Secures calling card (if needed) to cover calling expenses prior to calling.
- C. Calls Families on their assigned portion of the phone tree utilizing a script. Completes calling in a timely manner. If unable to complete calls, notifies Phone tree Chairperson immediately so that another caller can complete the calls.
- D. Keeps a log of calls made and received and their results.
- E. Directs Families with questions or concerns to appropriate resources or to Family Assistance at 1-800-658-3930.
- F. Reports problems, concerns or questions from Family members to Phone Tree Chairperson.
- G. Ensures necessary follow up is completed for Families requesting information or requiring assistance.
- H. Makes "We Care" calls as scheduled.
- I. Informs Phone Tree Chairperson of updates to their portion of the phone tree when Families have changes.
- J. Welcomes new Families assigned to their portion of the phone tree group.

### **What Do You Need to Get Started As a Phone Tree Key Caller?**

#### **Here is a list:**

- a list of assigned Families and phone numbers for your branch of the phone tree,
- a calling card, if needed,
- an ample supply of message log forms and pen/pencil,
- a copy of the calling script (if using),
- resource numbers and information, State Family Assistance, 1-800-658-3930

### **Tips for Handling Calls Effectively**

#### **While listening, ask yourself these questions:**

- What is the caller really saying? Keep in mind that the call is important to the caller.
- What basic needs does the caller have?
- What expectations does the caller have? Are they realistic?
- Who can help? As much as possible, refer the caller to resources that can be used by the caller to solve the problem.

### **Recording Volunteer Hours**

Volunteer hours are one component that National Guard Bureau (NGB) utilizes to determine budget dollars that states receive annually for the operation of their Family Program. Reports are pulled from the NGB website, [jointsevicesupport.org](http://jointsevicesupport.org) (JSS). In order for NGB to pull accurate reports on each state's Family Program, our State Family Readiness Office asks **you to register on the [jointsevicesupport.org](http://jointsevicesupport.org) website and to record your volunteer hours there.**

NGB utilizes the measurement of hours because they need a concrete measurement to determine if our state's program is active and viable. Hours are looked at cumulatively not individually so all do make a difference. Hours would only be looked at individually to help determine volunteer awards.

Once you are registered on the site, you gain access to information pertinent to National Guard Families. Additionally, our office can accomplish email campaigns and workshop and training registrations more simply with the capability for you to do it online.

Documentation of volunteer time and activities can be completed under **Activity tracking**, **eliminating the need to forward your volunteer time records to our office.** This will simplify the process of recording your time for you since projects and activities can be recorded as you complete them.

Additionally, National Guard Bureau tracks these entries to help identify trends with our Families, support required, needs and training. Your entries will allow the services in our state to continue and expand.

If you do not have a computer, you can send in your volunteer hours to the State Family Readiness Office on SD National Guard Form 600-12-12R (Volunteer Time Record – (See appendix) and we will gladly enter them on the portal for you.

## **CRISIS INTERVENTION**

**The goal of crisis intervention is to allow those involved to resolve the situation themselves giving them back some control; normally in a crisis people feel powerless. If possible, you want to empower them to resolve their situation and give them the tools and resources to do so.**

***Some basic rules for crisis intervention follow:***

**1. LISTEN** – let the people involved speak. Try to truly listen to them. Be sure you hear how they see the problem and what they expect from you. Verbalize what you hear and see happening descriptively not critically.

- a. You can help people by listening, offering suggestions only when the individual cannot think of alternatives.
- b. Do not give advice or assume responsibility for the person's problems or life.
- c. Let the person take the lead. Often, the individual needs and wants to talk the problem out.
- d. Work toward clarification of the situation. Refer them, if needed.

**2. VALIDATE** – You may not think it is an emergency, but to them it is. We all want our feelings validated. "Yes, that does seem to be a problem." Avoid being negative, "Why didn't you call two days ago?" People need reassurance, not scolding.

- a. Be empathetic and help them identify their feelings. Are they depressed, frustrated, angry? Encourage the person to talk on a feeling level?
- b. Try not to become absorbed with past reasons for present problems. Focus on what is happening now and what can be done to change it.

**3. HONESTY** – be honest. Do not promise anything you can not produce.

**4. RESPECT** – be respectful of others. Treat them, as you would want to be treated.

- a. Many times you may be the first person they talk to, so they may be upset. Everyone handles stress differently, some people get angry, some cry, etc. **Don't take it personally.**
- b. Sometimes just verbalizing the problem is enough.
- c. Or just asking the right questions, for example, "Do you have anyone who lives nearby that could change that tire?" "Could you call them?"

**5. REFER** - You are not a social worker. Know when to refer them to another agency and where to refer them. Don't confuse them with multiple referrals. Ensure they know who will do what. **You can always refer them to Family Assistance at 1-800-658-3930.**

- a. Do not call others to help them without their permission.

**6. FOLLOW-UP** – Always, always follow-up. Check on the person and see if they have been able to resolve their problem or if they need further assistance.

**7. CONFIDENTIALITY** – Protect and honor people's privacy.

**Tips for Dealing with People in Crisis**

**While listening, ask yourself these questions:**

- Understand what coping stage the individual is in which gives an indication if the individual will be receptive to help, initially people may not be.
- Recognize that an individual will be experiencing a range of emotions and may want information or assistance to solve the problem. Remember the goal is to resource them so they can solve the problem.
- Treat the individual with care. Listen carefully and speak calmly.
- Do not make promises that can not be kept. Refer.
- If individual rambles when speaking, try to help them identify the major issue that can be solved by them easily. Focus on the present.
- Helping them to problem resolution (even if small problem) can calm them and build their confidence.



# APPENDIX



1-800-658-3930

[familyprogram@sd.ngb.army.mil](mailto:familyprogram@sd.ngb.army.mil)

# South Dakota National Guard Family Readiness Telephone Tree Handbook

## VOLUNTEER AGREEMENTS

It is important for volunteers to sign the volunteer agreement (DD2793) which then recognizes them as statutory volunteers serving in an official capacity in direct support of the National Guard Family Readiness Program. The agreement also needs to be signed by the State Family Readiness Director and on file in the State Family Readiness office. It states that they donate their time and services to FRG projects and activities. It ensures that with regard to incidents which might occur during the performance of approved volunteer services that they would be covered under tort claims and workman's compensation for purposes of reimbursement under title 10, US Code 1588.

VOLUNTEER AGREEMENT FOR			
<input checked="" type="checkbox"/> <b>APPROPRIATED FUND ACTIVITIES</b>		<input type="checkbox"/> <b>NONAPPROPRIATED FUND INSTRUMENTALITIES</b>	
PART I - GENERAL INFORMATION			
1. TYPED NAME OF VOLUNTEER <i>(Last, First, Middle Initial)</i>		2. YEAR OF BIRTH	
3. INSTALLATION ARMORY		4. ORGANIZATION/UNIT WHERE SERVICE OCCURS	
5. PROGRAM WHERE SERVICE OCCURS FAMILY PROGRAMS		6. ANTICIPATED DAYS OF WEEK	7. ANTICIPATED HOURS
8. DESCRIPTION OF VOLUNTEER SERVICES Key Caller for Unit's Family Readiness Group Telephone Tree			
PART II - VOLUNTEER IN APPROPRIATED FUND ACTIVITIES			
9. CERTIFICATION I expressly agree that my services are being provided as a volunteer and that I will not be an employee of the United States Government or any instrumentality thereof, except for certain purposes relating to compensation for injuries occurring during the performance of approved volunteer services, tort claims, the Privacy Act, criminal conflicts of interest, and defense of certain suits arising out of legal malpractice. I expressly agree that I am neither entitled to nor expect any present or future salary, wages, or other benefits for these voluntary services. I agree to be bound by the laws and regulations applicable to voluntary service providers and agree to participate in any training required by the installation or unit in order for me to perform the voluntary services that I am offering. I agree to follow all rules and procedures of the installation or unit that apply to the voluntary services I will be providing.			
a. SIGNATURE OF VOLUNTEER		b. DATE SIGNED (YYYYMMDD)	
10.a. TYPED NAME OF ACCEPTING OFFICIAL <i>(Last, First, Middle Initial)</i> State Family Program Director	b. SIGNATURE	c. DATE SIGNED (YYYYMMDD)	
PART III - VOLUNTEER IN NONAPPROPRIATED FUND INSTRUMENTALITIES			
11. CERTIFICATION I expressly agree that my services are being provided as a volunteer and that I will not be an employee of the United States Government or any instrumentality thereof, except for certain purposes relating to compensation for injuries occurring during the performance of approved volunteer services and liability for tort claims as specified in 10 U.S.C. Section 1588(d)(2). I expressly agree that I am neither entitled to nor expect any present or future salary, wages, or other benefits for these voluntary services. I agree to be bound by the laws and regulations applicable to voluntary service providers, and agree to participate in any training required by the installation or unit in order for me to perform the voluntary services that I am offering. I agree to follow all rules and procedures of the installation or unit that apply to the voluntary services that I am offering.			
a. SIGNATURE OF VOLUNTEER		b. DATE SIGNED (YYYYMMDD)	
12.a. TYPED NAME OF ACCEPTING OFFICIAL <i>(Last, First, Middle Initial)</i> State Family Program Director	b. SIGNATURE	c. DATE SIGNED (YYYYMMDD)	
PART IV - TO BE COMPLETED AT END OF VOLUNTEER'S SERVICE BY VOLUNTEER SUPERVISOR			
13. AMOUNT OF VOLUNTEER TIME DONATED		14. SIGNATURE	15. TERMINATION DATE <i>(YYYYMMDD)</i>
a. YEARS <i>(2,097 hours=1 year)</i>	b. WEEKS	c. DAYS	d. HOURS
16.a. TYPED NAME OF SUPERVISOR <i>(Last, First, Middle Initial)</i>		b. SIGNATURE	c. DATE SIGNED (YYYYMMDD)

DD FORM 2793, MAY 2009

PREVIOUS EDITION IS OBSOLETE.

Adobe Professional 8.0

South Dakota National Guard Family Readiness Telephone Tree Handbook

**Service Member's Family Information Sheet**

**PRIVACY ACT STATEMENT**

**AUTHORITY:** Title 10 USC, Section 3012 (All information given is CONFIDENTIAL and will not be released.) **PRINCIPLE PURPOSE:** To assist the SDNG Family Program in providing care & assistance to military families & service members. **ROUTINE USES:** (1) For use by Unit Family Readiness Groups to develop FRG telephone trees & family newsletter & email address lists in order to disseminate pertinent information. (2) To gather data that will assist in the development of appropriate programs & services.

<b>Date Prepared:</b>		<b>Service Member Information</b>			<b>Date Reviewed:</b>	
<b>Service Member's Name (Last/ First/ MI)</b>		<b>Sex</b>	<b>Rank</b>	(circle): AGR TECH TRADITIONAL		<b>Unit Name</b>
<b>Service Member's Mailing Address</b>		<b>Marital Status:</b> ___ Single ___ Married ___ Divorced ___ Separated ___ Widow(er)		<b>Married Dual Military Couple</b> (circle): Yes No N/A		<b>Have you been mobilized before?</b> Y N
<b>City</b>	<b>County</b>			<b>Single Parent</b> (circle): Yes No N/A		<b>When: Where:</b>
<b>State</b>	<b>Zip Code</b>					<b>SM's Phone numbers - Home // Cell</b>
<b>Service Member's Employer: Company Name, Supervisor, Address, Phone Number / If unemployed or in school state below</b>						
<b>Spouse / Family Member / Friend Information</b>						
<b>Primary Point Of Contact (POC) Name</b>			<b>POC's Home Ph. Number</b>		<b>Relationship to ServiceMember</b>	
<b>Primary Point Of Contact Mailing Address</b>			<b>POC's Cell Phone Number</b>			
<b>City</b>	<b>County</b>		<b>POC's Email Address</b>			
<b>State</b>	<b>Zip Code</b>		<b>POC's Work Phone Number</b>			
<b>Secondary / Alternate POC Name</b>			<b>Relationship</b>	<b>POC's Phone Numbers - Home // Cell// Work</b>		
<b>Secondary / Alternate POC Mailing Address</b>			<b>City, State, Zip</b>		<b>POC's Email Address</b>	
<b>Names of Child(ren)</b>		<b>Age</b>	<b>Grade</b>	<b>Gender</b>	<b>Birthdate</b>	<b>Address (if different than service members)</b>
<b>Names of School(s) Your Children Attend</b>			<b>School Address</b>			
<b>Other Dependent Family Members</b>		<b>Age</b>	<b>Relation</b>	<b>EVACUATION INFORMATION</b>		
				Provide contact information where your family would go if evacuation were required due to natural disasters or state & national emergencies.		
				<b>Name:</b>		
				<b>Physical address:</b>		
				<b>City, State, Zip:</b>		
				<b>Their Home Ph:</b>		
				<b>Their Cell Ph:</b>		
				<b>Their Email:</b>		
				<b>Relationship:</b>		
<b>List any special needs, concerns, medical, or financial problems in your family that may require special attention or assistance as a result of your absence. If pregnancy, include due date.</b>						
<b>Signature of Service Member</b>						<b>Date</b>

SDNG FORM 600-12-11 (1Nov07) – Previous editions of this form are obsolete.

**REIMBURSEMENT FOR: TELEPHONE COST FOR VOLUNTEERS IN SUPPORT OF FAMILY PROGRAMS**

**Please print LEGIBLY – Unreadable data may delay payment.**

**Mail to:** Family Readiness Office ATTN: FRSA, 2823 West Main, Rapid City, SD 57702

**NAME:** \_\_\_\_\_

**MAILING ADDRESS:** \_\_\_\_\_

**COPY OF TELEPHONE BILL WITH CALLS MADE IN SUPPORT OF FAMILY PROGRAMS HIGHLIGHTED MUST BE ATTACHED TO THIS FORM FOR REIMBURSEMENT**

PERSON CALLED: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_  
SUBJECT: \_\_\_\_\_ DATE: \_\_\_\_\_  
(For example – wellness call, phone tree call)

PERSON CALLED: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_  
SUBJECT: \_\_\_\_\_ DATE: \_\_\_\_\_  
(For example – wellness call, phone tree call)

PERSON CALLED: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_  
SUBJECT: \_\_\_\_\_ DATE: \_\_\_\_\_  
(For example – wellness call, phone tree call)

PERSON CALLED: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_  
SUBJECT: \_\_\_\_\_ DATE: \_\_\_\_\_  
(For example – wellness call, phone tree call)

PERSON CALLED: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_  
SUBJECT: \_\_\_\_\_ DATE: \_\_\_\_\_  
(For example – wellness call, phone tree call)

**APPROVED BY:** \_\_\_\_\_ **STATE FAMILY PROGRAM DIRECTOR**  
(NAME, TITLE OF APPROVING AUTHORITY)

**RECEIVED: \$** \_\_\_\_\_

**VOLUNTEER SIGNATURE:** \_\_\_\_\_  
(Must be signed for reimbursement)

## FAMILY PROGRAM VOLUNTEER ACTIVITY TRACKING FORM

**Name** \_\_\_\_\_ **Unit** \_\_\_\_\_ **Volunteer Posn** \_\_\_\_\_

Please record volunteer hours/activities below. Include volunteer meetings, planning/prep time, traveling to & from activities & unit, telephoning, working at home on projects, unit activities, & anything else for volunteering with the Family Program. **Forward form to Family Program Office the 1<sup>st</sup> of Jan, April, July and Oct; 2823 W Main St, Rapid City, SD 57702 ATTN: FRSA**

**OR:** Documentation of volunteer time & activities can also be completed under Activity tracking on [joinservicessupport.org](http://joinservicessupport.org) eliminating the need to forward this form to our office. This also simplifies the process for you since projects & activities can be documented as you complete them.

Date of Activity/Event	Activity/Event/Training/Meeting	# of hours Prep Time	# of actual hours	Miles/ Location Travel Time

**Why record your hours?** Hours are looked at cumulatively not individually so all make a difference. National Guard Bureau tracks these entries to help identify trends, support needs, state's funding, and training. Your entries will allow the Family Programs in South Dakota to continue and expand.

**What if you do not have a computer or are not comfortable with one?** Please continue sending your hours on the form as stated above. **THANK YOU FOR YOUR TIME & COMMITMENT!**

*Optional Form*

**FRG Phone Tree Worksheet**  
(worksheet to help you create your unit's FRG phone tree)  
Include alternate phone numbers (home, work, cell)

Group

**Primary Caller**

Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

**Alternate Caller**

Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

1. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

2. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

3. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

4. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

5. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

6. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

Group

**Primary Caller**

Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

**Alternate Caller**

Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

Contacts

1. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

2. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

3. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

4. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

5. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_

6. Name: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Ph#s: \_\_\_\_\_

Email address: \_\_\_\_\_

\_\_\_\_\_



**Your Personal Phone Tree Worksheet**  
**Include alternate phone numbers (home, work, cell)**

Because the purpose of the Family Readiness Group (FRG) phone tree is to quickly and accurately disseminate important information such as unit or FRG business, each service member has only one contact on the FRG phone tree in order to expedite calling when the tree is activated.

The service member's FRG phone tree contact is determined by the service member's designation upon their family information sheet. Changes to the service member's family information sheet and their designation can only be made by the service member.

**If you are your service member's designated point of contact on the FRG Phone Tree, please complete the below information and post by your telephone or on your refrigerator so when you receive a call you will be able to pass the information along to your other family members and friends.**

**Personal Contact Tree**

1. Name: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Email: \_\_\_\_\_

2. Name: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Email: \_\_\_\_\_

3. Name: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Email: \_\_\_\_\_

4. Name: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Email: \_\_\_\_\_

5. Name: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Email: \_\_\_\_\_

6. Name: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Ph#s: \_\_\_\_\_  
Email: \_\_\_\_\_

## **Volunteer Services Confidentiality Statement Phone Tree Key Callers**

I, the undersigned, do hereby acknowledge that in my volunteer role as a phone tree caller for the National Guard, I may have access to confidential and private information from National Guard unit and families.

I agree that I shall not disclose any such confidential or private information maintained by the National Guard or obtained by me to any unauthorized person, and I will honor confidentiality and privacy of families.

I acknowledge and agree that disclosure by me of confidential or private information obtained by me in the course of my volunteer status could be cause for termination from my volunteer position.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Volunteer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Lead Volunteer Signature

**Kept on file in the unit's Family Readiness Binder under TAB 3 (Telephone Trees)**



## Instructions to Callers

**The following instructions to callers** (from the Phone Tree Chairperson) **should be included with each calling script:**

- a. Ensure to use the attached script to ensure all families receive the same information.
- b. Whether or not it is ok for callers to leave the information being delivered on answering machines.
- c. Identify how many attempts to reach the family should be made prior to leaving a message (depending on message, first time is ok, but usually no more than 3 attempts over a couple of days before leaving a message).
- d. Provide callers a call back number to leave if they are not comfortable leaving their number (if leaving a message) so that Families have a place to call should they have questions.
- e. Reminder to verify family's contact information is current – any changes? Report any changes to Phone Tree Chairperson.
- f. If you are unable to make your calls in the allotted timeframe because of circumstances that prevent you from doing so, let your primary caller know so your families can be called by someone else.

Allotted timeframe for completing calling is usually over the period of 4 to 7 days which is determined by group depending on urgency of message. Callers need to know this.

- g. Key Callers report back to your Primary Caller (include name and contact information for them to call/email) when all calls are completed. Report any needs or follow up details from any family member contacted are reported at this time as well. Callers can scan phone log (page 28 of this handbook) and email back.

### Example of Calling Script

Calling scripts will be issued by the Lead Volunteer via email to each primary caller who in turn will issue them to each of the Phone Tree Key Callers via email within their group.

When testing your phone tree or delivering a planned message in order not to alarm families and to ensure the most success in calling, prior to calling your FRG members a mass email message should be sent to FRG members notifying them that the phone tree will be activated and that someone from the FRG will be calling them. Include timeframe of calling such as between this and this date.

If the message is an emergency message, follow up with an email to FRG members with the script.

Hello, this is \_\_\_\_\_ with the \_\_\_\_\_  
(state your name) (state your unit designation)

Family Readiness Group. Today we are calling to introduce ourselves and to test the FRG telephone tree to ensure it works and that your contact information is correct.

I have volunteered to be a caller for our FRG phone tree and assigned to the portion of the tree your Family is on. I will normally be the person contacting you when our phone tree is activated.

We also want to ensure you have the Family Assistance Phone Number should you have an emergency or questions or concerns. It is 1-800-658-3930.

Do you have any questions?

**If leaving a message, leave a call back number** should they have questions or concerns.



## Regulations

### **FORSCOM Regulation 500-3-3**

**2-I-21. TASK:** Establish a Family Support Group (FSG).

**STANDARD**

Establish a FSG IAW AR 600-20 and DA PAM 608-47 and coordinate liaison with supporting activities. Minimum procedures include:

a. Appoint an officer or senior NCO as the unit Family Assistance Coordinator.

**b. Support preparation of a telephone tree for FRG members.**

c. Maintain communication between family support group leader and STARC/RSC Family Support Coordinator.

d. Post location (and telephone number if available) of supporting Family Assistance Centers.

e. Conduct annual briefings to family members IAW Annex C.

### **Army Regulation 608-1 (19 Sep 2007)**

J-2. Family Readiness Groups roles and functions.

d. Certain FRG mission activities are essential and common to all FRGs. They include FRG member meetings, FRG staff and committee meetings, publication and distribution of FRG newsletters, maintenance of updated Family rosters and Family readiness information, **establishment of FRG member telephone trees** and email distribution lists, and scheduling educational briefings for FRG members. FRG activity level can vary depending on unit mission and on whether the unit is in pre- or post-deployment, deployed, or in a training/sustainment period at the home station.

### **Army Regulation 600-20 (18Mar2008)**

#### **5-10. The Total Army Family Program**

The Army places a high value on both military and personal preparedness. Commanders have an obligation to provide assistance to establish and maintain personal and Family affairs readiness.

(b) Family Readiness is the mutual reinforcement provided to Soldiers, civilian employees, retirees (regardless of marital status), and their Family members-both immediate and extended. Examples include Family Readiness Groups, newsletters, **telephone trees**, and other volunteer programs and activities.

### **Operation Ready – 2006**

Pages 29, 41-42 – Key Caller responsibilities and phone tree details as stated in this handbook

## Training Completion

Congratulations! Having reviewed this handbook and accompanying power point Telephone Tree class, you have completed the FRG Telephone Tree Key Caller Training. These are the skills you'll need to complete your position as Key Caller successfully. Should you have any questions, please call 605-737-6089/381-5761 or email, familyprogram@sd.ngb.army.mil

Please complete and sign the certificate below. Then cut this page on the dotted line and return the certificate to the State Family Readiness Office, ATTN: FRSA, 2823 West Main Street, Rapid City, SD 57702 or fax to 605-737-6088. The certificate will be included in your unit's Family Readiness Group file.

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### *Certificate of Completion* *Family Readiness Group Key Caller Training*

*Trainee (Your) Name:* \_\_\_\_\_

*Date of Completion:* \_\_\_\_\_

*Trainee (Your) Signature:* \_\_\_\_\_ *Date:* \_\_\_\_\_

**File in Tab 3 of your Unit's Family Readiness Binder**

**End of Handbook**