

Family Readiness Group TELEPHONE TREE



What is it?

***How to Develop and Utilize One.
Callers***



What You Will Learn About FRG Telephone Trees



- *What is a Phone Tree*
- Requirements and Regulations
- *Goals of Phone Tree*
- How they are developed
- *How they work*
- Types of Calls
- *Where to File Your Phone Tree*
- Payment for Calls
- *Phone Tree Callers*
- Crisis Intervention

INTRODUCTION



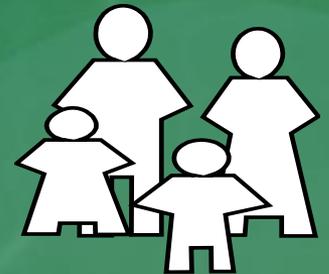
Learn what this system is and how it enables Family Readiness Groups to quickly and accurately disseminate information to their Families.



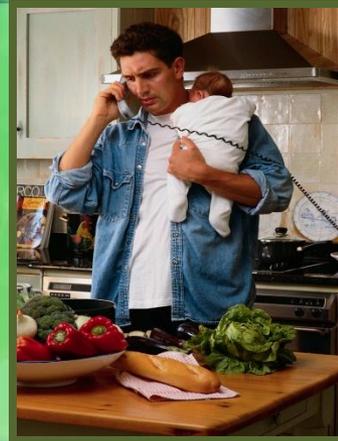
INTRODUCTION



Additionally, learn why telephone trees are an important and useful tool for Family Readiness Groups to develop and maintain.



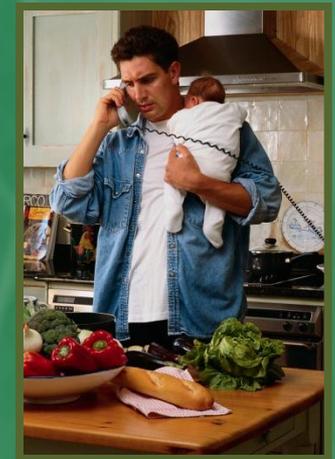
What Is a Phone Tree?



What Is a Phone Tree?



- System used to quickly & accurately disseminate information to unit Families
- Used in emergencies
- Used for rumor control
- Similar to unit's soldier alert roster
- Used for wellness checks
- Lead Volunteer has oversight responsibility for its completion



Goals of Phone Tree?



- Passes important information to Families
 - upcoming FRG events
 - unit's status
 - unit news

- Helps with RUMOR CONTROL



Goals of Phone Tree?



- Assures Families that there is someone to assist during Family emergencies
- Or someone that they can express their concerns to
 - someone who will listen
- Can help improve the quality of life and morale of the unit



Fosters sense of belonging – because every Family is included (can improve service member retention)

FRG Phone Tree Is Required By Military Regulation



Family Readiness Requirements



- **Family Readiness Group Telephone Trees are to be established by Regulation:**
 - **Forces Command (FORSCOM) 500-3-3**
 - **Task 2-I-21 b.**
 - **Army Regulation (AR) 608-1**
 - **Appendix J-2 d.**
 - **Army Regulation 600-20**
 - **Paragraph 5-10a. (b).**
 - **Operation Ready**
 - **Pages 29, 41-42**



Family Readiness Requirements



- FRG telephone trees are reviewed during unit inspections which help to indicate if a unit has a viable Family Program
- Items checked during inspection:
 - FRG Telephone Tree developed and current
 - FRG Telephone Tree tested & test date documented
 - Enter date(s) the Telephone Tree was tested - on actual telephone tree document that is filed in unit Family Readiness Binder under TAB 3



How Is It Developed?



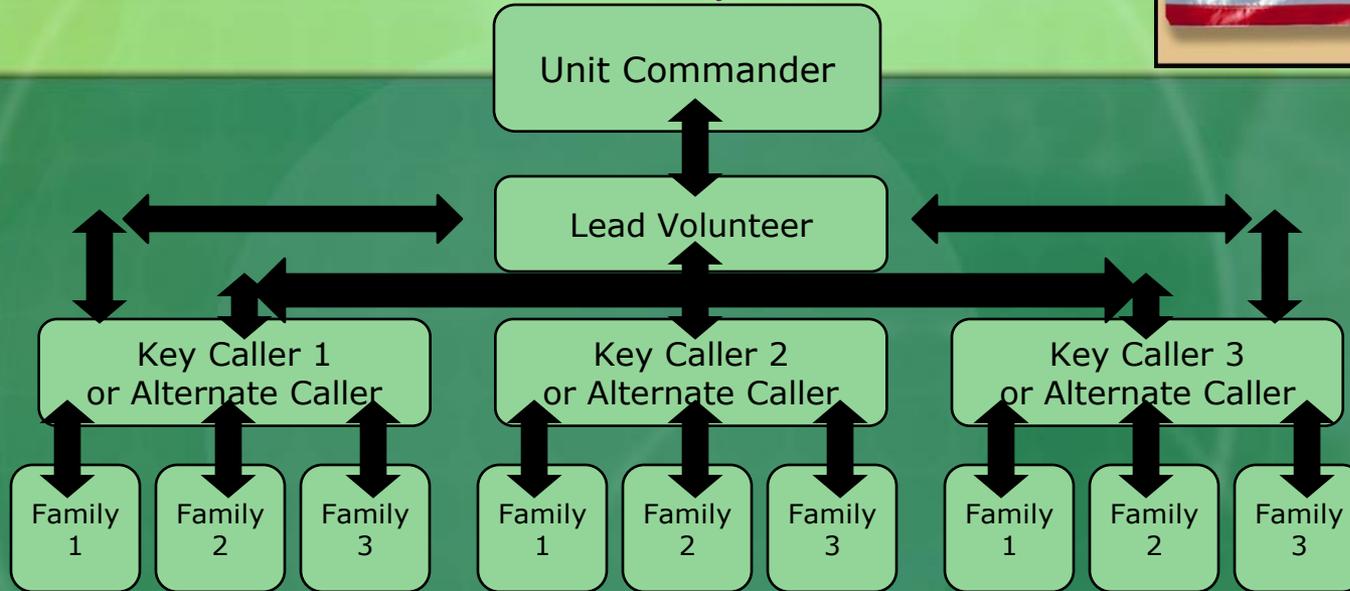
How Is It Developed?



- The Phone Tree is developed from the Service Member Family Information Form
 - (SD National Guard Form 600-12-11)
- Form is completed by service member with assistance of FRG volunteers or unit personnel annually or a change occurs
 - Contains personal points of contact information for service member

Basic Phone Tree Flowchart

File copies of phone tree at the unit in the Unit's Family Readiness binder & the State Family Readiness Office.



1. Develop groups based on geographic location to minimize long distance calls. To expedite calling, try to keep 6 to 8 per group depending on unit size.
2. **Appoint alternate Key callers** in case primary Key callers are not available.
3. Include home, work and other alternate points of contact to include email addresses for each family. **Do informal test of tree periodically.**
4. When calling, be accurate, be brief, be clear, summarize, give point of contact number, log each call and **report back to Lead Volunteer** upon completion of calls or after 3 attempts. Lead Volunteer reports back to Unit Commander.

MAINTAIN CONFIDENTIALITY



- Ensure Privacy and Confidentiality of Family Member Information.
- To protect Families' personal data from unauthorized use, only key leaders should have a complete copy of the FRG membership roster or the phone tree
- Sensitive information should be omitted
- Careful control of all copies of the rosters and phone trees

MAINTAIN CONFIDENTIALITY



- Ensure Privacy and Confidentiality of Family Member Information.
- Only give Key Caller the portion of phone tree needed for their phone tree group
- Destroy obsolete copies
- Collect copies when caller or leader moves or leaves the job

How Does It Work?



How Does It Work?



- Unit commander, lead volunteer or State Family Readiness Office can initiate the phone tree
- Lead volunteer contacts Key callers for each group
- Key callers contact Families in their group
- Calling continues until all Families are contacted (message left or 3 attempts made)
- Key callers notify lead volunteer upon completion of all calls or attempts to reach



PAYMENT FOR CALLS



- Calling cards are available from the State Family Readiness Office
- Reimbursement for calls through the State Family Readiness Office is another option
 - Requires copy of phone bills with calls highlighted calls to include cell phones
 - Attach phone bill to SD National Guard Form 600-12-8R (telephone cost reimbursement form found in telephone tree handbook)
 - Submit to Family Readiness Office



WHERE TO FILE YOUR TELEPHONE TREE?



- File a copy at the unit in the Commander's Family Readiness Purple Binder – Tab 3
- Send copy to the State Family Readiness Office – ATTN: FRSA



Types of Calls



- Phone Tree Calls
- We Care Calls
- Critical Incident Calls



Phone Tree Calls



- Initiated by the Commander, Lead Volunteer or State Family Readiness Office to disseminate information to families

- Is brief (just a few minutes)
- Scripted



We Care Calls



- Normally made **during mobilization**, however can be made at other times to help build rapport with Families.
- Focus on well-being of Families
- More relaxed than phone tree calls
- May last longer than 5 minutes
- Don't necessarily need a script
- Scheduled once a month during deployment or as determined by FRG



Critical Incident Calls



- Only made in the event of a death(s) of a service member(s). Calls only made by the State Family Readiness Office after deceased service member's Family has been notified.



State Family Readiness Office Critical Incident Calling Policy



- State Family Readiness Office will be the **ONLY initiating authority** to activate calls after authorization from the State Personnel Office – approved by the Adjutant General
- State Family Readiness Office has a **Designated & trained Calling Team**
- Calls only made to the affected unit's FRG members after Family(ies) of deceased service member(s) have been notified



■ *Key Callers*



We Care & Phone Tree Callers



Characteristics of Callers:

- Good Listeners
- Friendly
- Empathetic
- Truthful but Tactful
- Positive Attitude
- Maintain Confidentiality



KEY CALLERS

Responsibilities



- Signs volunteer agreement DD2793
 - **Makes Statutory volunteer** which serves in official capacity in direct support of the National Guard Family Program as FRG Telephone Tree Key Callers.
 - **Record their volunteer hours**
 - Agreement states that they donate time and services to FRG projects and activities



KEY CALLERS Responsibilities



- Signs volunteer agreement DD2793
 - Recognized as official in matters of tort claims & for purposes of reimbursement under provision 10, US Code 1588
 - Can be reimbursed for incidental expenses
 - May be placed on Invitational Travel Orders



KEY CALLERS

Responsibilities



- Calls Families to provide information
 - Uses script provided by Phone Tree Chairperson
- Maintains log of calls
 - Both made and received
- Refers Families to appropriate resources
 - Family Assistance 1-800-658-3930
- Reports any issues/questions to Phone Tree Chairperson
 - Ensure follow up is completed



KEY CALLERS

Responsibilities



- Maintains confidentiality
 - Dispels rumors, discourages gossip
- Makes “We Care” calls
 - As determined by FRG
- Reports updates to their portion of Phone Tree
 - Address and phone number changes
- Welcomes new Families assigned to their portion of Phone Tree



WHAT TO SAY?



- **BE BRIEF** (try to keep calls to 5 mins) unless making “We Care” Calls
- **BE ACCURATE** (stick to the script)
- **BE CLEAR**
- **SUMMARIZE**
- **ASK** if they have questions about the subject of the call
- **GIVE THEM A POINT OF CONTACT #**
- Use a **SCRIPT** – provided by Lead Volunteer or phone tree chairperson



Example of Script

From FRG Phone Tree Chairperson

(received via email)



- Hello, this is _____ with the 200th Engineer Company
- (state your name) (state your unit)
- 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 phone tree and am 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, questions or concerns. It is 1-800-658-3930.
- Do you have any questions?(If leaving a message, ensure to leave a call back number.)

Directions for Script

(From FRG Phone Tree Chairperson)



- Directions for implementing the script will also indicate:
 - Whether it is ok for the caller to leave a message with the family
 - How many attempts the caller should make to reach a family
 - Reminder for caller to ensure family's contact information is correct and to forward changes to the FRG Telephone Tree Chairperson

Directions for Script

(From FRG Phone Tree Chairperson)



- Directions for implementing the script will also indicate:
 - Timeframe for making the calls from (start date–end date)
 - Notify your primary caller if you are unable to make your calls so someone else can
 - Report back contact information for key callers when their calls are completed

We Care & Phone Tree Calls



Tips for Key Callers:

- DO
- Maintain a log of all calls
- Know resources available – refer to Family Assistance 1-800-658-3930
- Do try more than once to call a Family if there is no answer the first time (try at least 3 times) – ok to leave message
- Give them a point of contact number
- Ensure any necessary follow up is done



We Care & Phone Tree Calls



Tips for Key Callers:

- **DO**
- Always identify yourself and your unit FRG at the beginning of the call
- Ask if this is a convenient time to talk
- Establish a rapport with your Families
- Maintain confidentiality and privacy

Family
Readiness
Group

We Care & Phone Tree Calls



Tips for Key Callers:

- **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 (1-800-658-3930)
- Go beyond your own limits in providing assistance
- Gossip or repeat rumors



MAINTAIN CONFIDENTIALITY



■ Volunteer Services Confidentiality Statement Phone Tree Key Callers

- 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.

Getting Started as a Phone Tree Key Caller



■ What You Need:

- 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,
- Resource numbers and information - Family Assistance, 1-800-658-3930



Recording Your Volunteer Hours



- **Go to:**
<http://www.jointservicesupport.org>, click on National Guard Family Program
 - If not registered, Create user name and password
- **Go to *Activity Tracking***
 - Enter your volunteer hours
- **If you do not have a computer**
 - Record hours on SD National Guard 600-12-12R (volunteer time record) and mail form to State Family Readiness Office



Dealing With People When Making Calls



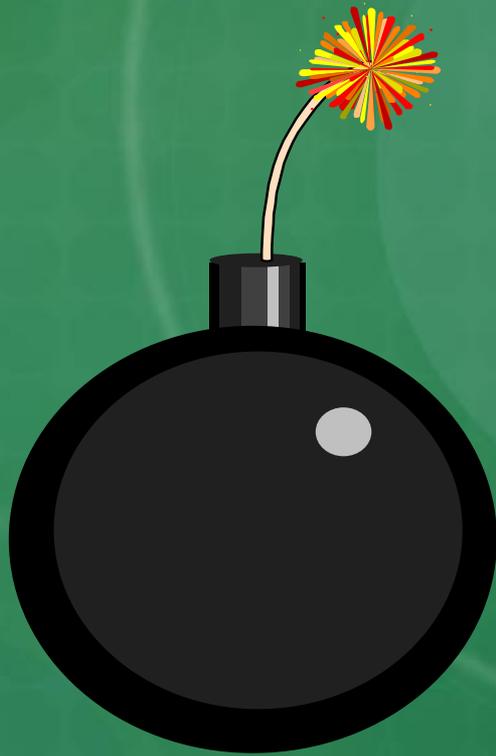
Dealing With People

- Be Kind
- Be Courteous
- Be Respectful
- Be Brief
- Be Positive
- Don't gossip or make speculations when asked "what if " questions
- Don't take things personally if someone is rude or obnoxious – do report to your Phone Tree Chairperson as you do not need to deal with

Dealing With People

(in a crisis)

When Making Calls



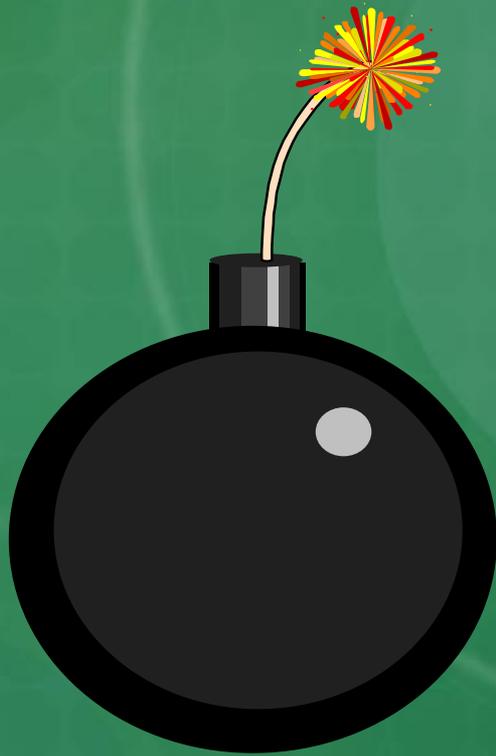
CRISIS

INTERVENTION

CRISIS INTERVENTION



CRISIS GOAL



- To allow the people involved to resolve the situation themselves.
- Give them control because in a crisis we feel as if we have NO control.

BASIC RULES

Crisis Intervention



LISTEN
VALIDATE
HONESTY
RESPECT
CONFIDENTIALITY
REFER
FOLLOW-UP



LISTEN



Let them speak

Do not give advice

Let them take the lead

Work toward clarification



VALIDATE



We all want to be validated

Avoid being negative



Be empathetic - (talk on a feeling level)

Focus on now – not the past

RESPECT



- Treat them as you would want to be treated
- Don't take things personally
- Help them to solve the problem on their own



CONFIDENTIALITY



- Protect and honor people's privacy.



HONESTY



- Do not promise things you can not produce.



REFER



- You are not a social worker.
- Don't confuse them with multiple referrals.
- Don't call anyone without their permission.



FOLLOW-UP



Always, Always
Ensure Follow Up
Is Completed



Tips for Dealing with Individuals in Crisis



- Understand what coping stage the individual is in
 - Gives an indication if individual will be receptive to help
- Recognize that an individual will be experiencing a range of emotions
 - Will want information or assistance to solve problem

Tips for Dealing with Individuals in Crisis



- Treat the individual with care
 - Listen carefully and speak calmly
- Do not make promises that can't be kept
 - Refer
- If individual rambles when speaking
 - Try to identify major issue, that can be solved by them easily, focus on the present
 - Problem resolution can calm them and build their confidence

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Thank You for Your Dedication and Commitment



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