



BARROW UPON SOAR GOOD NEIGHBOUR SCHEME

Telephone Co-Ordinator Guidance

G003

Introduction: The Telephone Coordinator mobile number is the main contact for all members phoning to ask for support, or for volunteers reporting back about the support they have provided. It is also the main contact number given for any general enquiries about the scheme. The Telephone Coordinator is not expected to deal with all such enquiries, but is asked to take some initial information from the caller and then pass the details to the Admin Team so that it can be dealt with.

All Telephone Coordinators should be confident using an Apple iPhone see '*TCF_03_MobilePhone Instructions*', Google apps such as **Gmail, Calendar, and Drive**, and other apps such as **WhatsApp, Reminders, and Notes**.

Telephone Coordinators can accept new one-off task requests from members and allocate volunteers to provide that support. Requests such as a garden tidy up, or a trip to the doctors, should be listed as requests via the relevant **WhatsApp group**. Please note that the scheme is a planned service only and sufficient notice should be given by members for all new requests for support. [Please enter all new tasks agreed into the Telco Google Calendar as detailed in section 0 Using Google Apps.](#)

Longer term repeatable requests, such as regular transport trips, and weekly befriending calls, are managed by the Admin Team and planned/agreed in advance. Requests for changes to this planned service can be made and arranged by the Telephone Coordinator in agreement with volunteers.

1. When handing over Telephone Co-ordinator duties:

- a. When you receive the BGNS Mobile phone please confirm you have the current passcode – details can be found on the 'BGNS Telco Group' WhatsApp group description and in '*TCF_01_Passwords*'.
- b. Please check that the phone is charged and that it is not on Silent mode. Check for any new messages or missed calls as soon as possible. **Please check that that the phone has connected to your own private Wi-Fi provider.**
- c. Check the following Apps for any new/unanswered messages and all current up-to-date task information:
 - Gmail
 - WhatsApp
 - Reminders
 - Google Calendar - check what tasks are due to take place shortly
 - Notes
- d. Please check that you can access all relevant files on Google Drive, 'Members_Register', 'Volunteers_Register' – both View Only, and 'Task_Details' – Full Access.

- e. Before the end of your week, liaise with the next person on the rota to arrange a handover. Ensure there is sufficient time to discuss any open or unplanned tasks. The next person's name can be found in the 'TCF_02_Telco_Rota' spreadsheet – on the 'Rota (current year)' tab.
- 2. When A Caller phones who is not part of BGNS and requests or offers support:**
- a. If the caller wishes to become either a **member or a volunteer**, make a note of their name and telephone number. Inform them that the Admin Team will get in touch to arrange a visit or a call, and to provide more details about the type and level of support available.
 - b. Inform the caller that a task can NOT be undertaken until they are registered with the scheme.
 - c. Pass the details to the Admin Team.
- 3. General - When a new request for support is made:**
- a. The name of the **member calling will be displayed**. Make a note of the new request with as much detail as possible. Inform the member that all efforts will be made to support that request but it cannot be guaranteed and is dependent upon volunteers being available.
 - b. Check if the task has already been recorded on the 'Task_Details' spreadsheet, 'Task_Number' tab, and/or arranged in the *calendar*.
 - c. Follow instructions in **section 4, Using WhatsApp to find an available volunteer**
 - d. When a volunteer has been identified, **enter the details in to the 'Task_Details' spreadsheet, 'Task_Number' tab** to show the status as 'Open'.
 - e. **Add a new event in the Calendar** in detail to ensure BGNS knows the whereabouts of the volunteer and which members they are supporting – follow relevant instructions in **Section 0 Using Google Apps**.
 - f. **Call the member back** informing them of the name of the volunteer(s) and when they are likely to be arriving or contacting them.

Declining A Task

- g. The scheme is a planned service only and can only continue with the good will of its volunteers.
- h. Occasionally requests for support have to be declined due to various reasons, such as volunteer drivers not being available, or too short notice provided. If you need to decline a request for support, please advise the member to contact another relevant agency if possible. See 'TCF_05_UsefulContacts' for details of other agencies that may be able to offer support.

Cancelling/Amending a Task

- i. When a member cancels a task, confirm who the volunteer(s) is/are by checking the calendar. Inform the volunteer(s) by WhatsApp, phone and/or text and delete the calendar event. If the task was a Single event only, update the 'Task_Number' tab in the 'Task_Details' spreadsheet to show the status as 'Cancelled'.
- j. If the member phones to change the task details in any way, such as the day or time, confirm if the current volunteers can accommodate the changes or not. If necessary, try to re-plan the task as if it is a new task.
- k. If a volunteer phones to say they are now unavailable for an agreed task, try to find a replacement volunteer by using the relevant WhatsApp group. Contact the member to inform them of the changes or cancellation of the task.

4. Using WhatsApp to find an available volunteer

- a. The following WhatsApp Groups can be used to find volunteers for ad-hoc requests:
 - Garden & House Team
 - Prescriptions Team
 - Drivers
 - Individual members teams

For Garden & House Team only:

- b. For all new requests, the Admin Team will need to arrange a home visit to confirm the size of the task and estimate how much time/effort/volunteers are needed, and to confirm the request timelines.
- c. Inform the group that support is required and request if anyone is free that they get in touch. Confirm how many volunteers are required.
- d. Once a volunteer(s) has offered support, contact them directly with the details.
- e. Ring back the member with details of the volunteer and day/time they will complete the task.

For Prescription Collection/Delivery only:

- f. Confirm the request is for the Barrow Boots Pharmacy only and that it is free to collect.
- g. Confirm the full name, address and postcode for the member as it appears on the prescription.
- h. Inform the member that you will request a volunteer to help, and will ring back to confirm if someone is available to collect/deliver.
- i. Inform the WhatsApp group that support is required and request if anyone is free that they get in touch.

For Drivers:

- j. Follow **Section 6, Allocating a Driving Task** for details. Inform the group that support is required and request if anyone is free that they get in touch. Once a volunteer(s) has offered support, contact them directly with the details.
- k. Ring back the member with details of the volunteer

For Members Teams:

- l. Other WhatsApp Groups have been set up for teams providing support to individual members. If this member requests ad-hoc support, this WhatsApp group can also be requested to provide support.

5. General - When allocating any Task please note:

- a. Using the BGNS mobile phone, call the volunteer to confirm they can do the task. Please reassure volunteers that it's fine to say 'no' to a request! We need to keep all our volunteers happy to continue, and able to say no without feeling guilty or feeling that they're letting BGNS down.
- b. Give the volunteer(s) all the information they will require about the task and the member, including any relevant problems with mobility or health issues, or whether the member has any pets etc. Ensure information about how to access a member's property is known and does not present any problems for the volunteer. This can be done via email, text, WhatsApp or verbally on the phone.

6. Allocating a Driving Task:

Discuss the following with Members:

- a. Always remind members that journeys outside of Barrow upon Soar village attract a charge of 50p per mile – see 'TCF_06_Distances_travelcosts' for indicative costs. Confirm whether they wish to continue and are able to make a payment to the driver on the day. Remind members that they must also pay for car parking charges.
- b. Members can pay by cheque if agreed in advance when a task is requested, payments to 'Barrow upon Soar Good Neighbour Scheme'.
- c. If a driving task involves a pet, the member must ensure that the pet will be restrained in a box or cage or with a strap or harness fastened to the car.
- d. If the task is for an appointment, ask the member how long it is likely to take. You may need 2 volunteers; one volunteer for the outward journey and a second volunteer for the return journey. Make the member aware that there is the possibility that volunteers may not be available for a lengthy journey.
- e. If the member has mobility problems and does not have a Blue Badge, explain that you do NOT need to have a car in order to have a Blue Badge and that it is helpful for our volunteer drivers, especially when parking, if the member has one. If the member would like help to apply for a Blue Badge, create a new task for this.

Discuss the following with Volunteers:

- f. If a driving task involves a pet, check that the driver is willing to carry the pet.
- g. Remind the driver to collect the correct charge - free in the village but 50p/mile elsewhere. The charge is from the member's house. If there are two drivers, each driver can collect for a single journey only. The driver can deduct 45p/mile from the charge and retain to cover fuel costs. If the driver does not claim the 45p/mile, then the contribution will be passed to the scheme funds and classed as a donation.
- h. Remind the driver to use the brown envelopes provided to note the details for cash payments and pass the money to the address shown on the envelope.
- i. Remind the driver to telephone the member a day or two before the task, to reassure them that they have not been forgotten and to remind them of the pick-up time. If the driver does not want their personal number to be known by the member, the driver should enter 141 before the member's telephone number.

For Driving Tasks needing a wheelchair:

- j. If a wheelchair is required or might be useful (e.g., for a hospital appointment), it may be best to have a chaperon or two volunteers - the chaperon or second volunteer can take the member into the hospital whilst the driver parks the car. Check on the location of the BGNS wheelchair by asking the Admin Team or via the 'BGNS Telco Group' WhatsApp group .
- k. If a wheelchair is required, make sure the volunteer is willing and able to lift the wheelchair in and out of the car.
- l. If the BGNS wheelchair is to be borrowed, confirm if the volunteer wants to organise this, or whether they want the Telephone Co-ordinator to arrange it. Make a note of these arrangements of the Task event in the calendar.

The options for a longer distance journey may include:

- m. Arranging transport via a third party if required e.g., ambulance service, or other local community transport such as John Storer House, or arranging a taxi.

7. Additional Responsibilities

- a. You will possibly be the first point of contact in the event of a volunteer encountering a problem. (In an emergency they are advised to go directly to the police or statutory agencies). Please make sure you are happy to take on this responsibility and that you are confident you can deal with any issues that may arise.

8. Using Google Apps

Google Calendar

The Telco Google Calendar is used to keep track of which tasks have been organised and which members/volunteers are involved. Tasks where volunteers and members meet each other only are recorded, telephone befriending calls are not recorded on the calendar.

We record this information using the '**Event**' option as more detail can be recorded.



To add a **new task**, click the plus button on the bottom right-hand corner, then click the '**Event**' button to enter the information as required.

Please ensure the following details only are added: Title, Date/Time, Colour, Description

The screenshot shows the Google Calendar 'Add Event' form. Annotations with lines pointing to specific fields are as follows:

- Title** – use the task number including the letter. Prefix with an asterisk* for multiple event tasks. (Points to the 'Add title' field)
- Date/Time** – as per task details. The default is just 30 mins so please adjust accordingly. (Points to the date and time selection fields)
- Colour** – use the correct colour for the different task type, **Red (Tomatoes) for Befriending** or **Orange (Tangerine) for a Walk**, **Blue (Peacock) for Transport**, **Green (Basil) for Household**, **Yellow (Banana) for forms & IT**. (Points to the color selection dropdown)
- Add Description** – add member and volunteer(s) names and short description of task. (Points to the description text area)

Note: When the Admin Team are visiting new members or new volunteers these are be added by the Admin Team directly. The colour of these meeting will normally be **purple (Grape)**.

Emailing and Contacts

The Admin Team will inform you when new volunteers have progressed through the DBS check process and will also add their contact details. (First name, last name, telephone number and email address).

Enquiries from potential new volunteers will initially be directed to the Telco Gmail account. Please forward all enquiries to the Admin Team so that they can reply directly. The Admin Team also has access to this account.

Documents – Google Drive

Google Drive has been selected to store and share information as the documents do not get downloaded onto the individual devices when opened. There are a number of documents owned by the Admin Team that are shared on a Read-Only basis with the Telephone Coordinator.

Under '**Drive**' there are a number of shortcuts for the frequently used documents. Under '**Shared**' there is access to all the files and folders available to Telco. These include files on Members and Volunteers, and documents that may be useful to the Telco role.

Most documents will be read only access only. The Tel Co can update the 'Task_Details' spreadsheet.

Please explore the contents of each shared folder to confirm what can be found where.

9. Other Apps

Notes: Create new notes to record any information that may need to be passed onto others or as required

Reminders: Use Reminders to set dates/times for when specific tasks are needed.

These apps should be used to pass information between different volunteers undertaking the Telco role.