National Alliance on Mental Illness

Orientation Packet

NAMI HelpLine Training Manual

For Information and Referral Specialists

July, 2013

NAMI
National Alliance on Mental Illness

WELCOME NEW VOLUNTEER**!**

On behalf of your colleagues, I welcome you to NAMI and wish you every success here.

We believe that each volunteer contributes directly to NAMI's growth and success, and we hope you will take pride in being a member of our team.

These Orientation documents, part of the HelpLine Training Manual, were developed to describe our expectations for volunteers and to outline NAMI policies for your benefit. Please read the contents of these documents carefully. Then sign and return the designated forms to your supervisor. Your supervisor will give you copies to keep in your Training Manual for future reference.

While the policies and procedures in this Orientation section will provide you with answers to general questions you might have about your volunteer position, it cannot cover every situation that might arise. If you have questions about these guidelines or need further information about any subject, please consult with your supervisor or the human resources department.

We hope that your experience here will be challenging, enjoyable and rewarding. We appreciate your support, time, energy and expertise. Thank you, and again, welcome!

Sincerely,

Michael Fitzpatrick

Michael Fitzpatrick
Executive Director

NAMI Information HelpLine:
Our "Good To Great" Vision

In many ways, the NAMI HelpLine is the national face, voice and ears of NAMI. When individuals living with mental illness, families, loved ones and professionals call 1 (800) 950-NAMI, we take pride in providing a unique service to these callers.

The Helpline Staff and Volunteers are GOOD at providing . . .

 Support through vital, accurate information and referrals to our callers. Our combined knowledge is one of our greatest assets.

 Support through empathy and understanding to our callers. We are a united, dedicated team because these issues have affected us all in our own unique way.

 Support to everyone in our NAMI HelpLine family. As a cohesive unit and as individuals who have been touched by mental illness, we care for each other and prop each other up when we experience our own hard times.

We are very GOOD at what we do, and we strive for GREATNESS daily!

We are GREAT because we embody . . .

Integrity

ABILITY

Knowledge

Experience

COMMITMENT

Keep up the GREAT work, HelpLine volunteers!
We thank you for all that you do. We couldn't do it without each other.
– The Helpline Staff & NAMI Management

NAMI Information HelpLine

Volunteering At NAMI

Policy Overview

Equal Opportunity Policy

NAMI strongly maintains an equal opportunity policy. We recruit, accept, train, promote and dismiss volunteers on the basis of competence and job performance, without regard to race, creed, color, religion, sex, sexual orientation, age, marital status or disability.

Volunteer Philosophy Statement

NAMI values volunteers as essential to NAMI's existence and ongoing vitality. NAMI aims to give volunteers meaningful responsibilities and recognition for work done. Volunteers are expected to actively perform their duties to the best of their abilities, while remaining loyal to the mission and vision of NAMI.

Initial Involvement

All volunteers will meet with a NAMI staff member to ascertain their suitability for and interest in a volunteer position. (This initial meeting should take place in person.) This screening process will offer NAMI staff and volunteer leaders the opportunity to learn more about new volunteers and give new volunteers the opportunity to learn more about the organization.

Orientation and Training

All volunteers will receive a general introduction about the nature and purpose of NAMI, a statement of volunteer policies and an overview of the volunteer's work to be assigned. Volunteers will receive the instruction necessary for performance of their volunteer responsibility.

Supervision

Every volunteer will have a clearly identified supervisor (staff member or volunteer leader) who will be available for consultation, support and direction. The identified supervisor will vary depending on the specific task and the personnel available at the time.

Feedback and Evaluation

Program participants and/or NAMI staff shall evaluate the work of volunteers. Staff members or volunteer leaders can recommend appropriate volunteers for service in other NAMI departments and on board committees and the board.

Recognition and Opportunities for Advancement

Volunteer service is very valuable to NAMI. NAMI endeavors to recognize the valuable service of volunteers, both formally and informally. Exemplary volunteers will be made aware of opportunities available for expanding their participation in the organization.

Standards of Ethical Conduct

All volunteers should conduct their work in a manner consistent with the NAMI mission and policies. All volunteers should disclose relevant interests and involvement to their staff contact when introduced to NAMI, and as potential conflicts of interest rise. Board members and volunteers with significant decision-making authority must comply with the NAMI conflict of interest policy.

Media Conduct

Volunteers should never represent themselves as spokespersons or representatives of NAMI. Only the Board President and the Executive Director or their designee shall serve as spokespersons for NAMI.

Use of NAMI Name/Conflict of Interest

Volunteers are not authorized to use the name of NAMI or the HelpLine except when involved in an approved NAMI/HelpLine activity, and only when acting in accordance with HelpLine Policies and Procedures. If there appears to be a possibility for conflict of interest, the volunteer/intern should discuss the matter with the HelpLine Manager. If the supervisor concludes that conflict of interest exists, the intern should not participate on the HelpLine.

Smoking Policy

Smoking is not allowed in the NAMI office or HelpLine, and is prohibited in the building by building management. Smoking is permitted behind and along side the building.

Holidays

Holidays on which the office (and HelpLine) is closed include:

New Year's Day
Martin Luther King, Jr.'s Birthday
Presidential Inaugural (as appropriate)
President's Day
Memorial Day
Independence Day
Labor Day
Columbus Day
Veterans' Day
Thanksgiving Day
Christmas Day
Two additional days at the discretion of the Executive Director

Alcohol/Drugs

When participating in NAMI programs and activities, volunteers are prohibited from purchasing, transferring, using or possessing illicit drugs, alcohol or prescription drugs that are in any way illegal. This policy ensures a drug-and alcohol-free location that is safe, healthy and productive for all volunteers and employees.

Harassment Policy

Volunteering should be an enjoyable experience. Harassment is not only illegal, it is uncomfortable for everyone in the area. Any volunteer who feels that he or she is the subject of harassment should immediately speak to his/her staff contact or supervisor to resolve the issue. The incident (and any resolution) must be reported to the Executive Director.

Safety and Legal Liability

Although the organization does its best to assure the safety of our volunteers, NAMI counts on volunteers to be alert in protecting their own safety. They need to pay particular attention to safety instructions and proper use of equipment. Volunteers should voice any safety concerns and report any injuries to the person in charge as soon as possible.
NAMI maintains commercial general liability insurance to protect volunteers and staff while they serve as agents of the organization. To be covered, volunteers must be working under the supervision and control of NAMI.
When a volunteer drives his/her own vehicle or another vehicle not owned, leased or rented by NAMI, NAMI liability and physical damage insurance do not apply. NAMI's board of directors and volunteers are covered by NAMI's Director's and Officer's liability insurance and by the fidelity bond.

Complaints / Disputes / Appeals

Volunteers are encouraged to familiarize themselves with these policies. Concerns relating to these policies are important, and management is expected to respond to such questions and concerns. In the event that these policies fail to address a particular situation, volunteers should seek further guidance from the HelpLine Manager.

***Volunteers:* Please sign and date this form and return it to your supervisor. You will receive a copy to keep in your Helpline Training Manual.**

I have read and understand NAMI's volunteer policies as outlined above.

Name: _____ ***Date:*** _____

Signature: _____

NAMI Information HelpLine

Statement of Commitment & Expectations

- **I, _____, have read the NAMI HelpLine Volunteer Information and Referral Representative position description. To fulfill my HelpLine responsibilities, I will:**
  - Commit to working at least one 4-hour shift a week for ***at least four (4) to six (6) months*** (number of months is negotiable for college students).
  - Satisfactorily complete all training activities
  - Follow all HelpLine policies and procedures exactly as directed.
- **IMPORTANT: Since successful operation of the Helpline depends on reliable and predictable volunteer support, I agree to:**
  - Consider my HelpLine schedule as significant as paid employment. I will make every effort to keep to my regularly scheduled shift (barring emergencies and illness). I will not schedule other activities during my HelpLine shifts without giving staff at least a week's notice.
  - Telephone a HelpLine staff member ***before*** my shift is due to start if I will be late due to unforeseen circumstances.
  - Recognize the HelpLine's need for consistently reliable and responsible volunteers in order to provide the best service possible. Therefore, I understand that ***only two (2) unexcused absences will be allowed, after which my volunteer position with the HelpLine may be terminated.*** (Excused absences include illness, emergencies and special unforeseen circumstances that are communicated to the HelpLine staff as soon as possible before your shift is due to start.)
- **I understand that I can expect thorough, complete and consistent training and support from HelpLine staff.** I have received and read the NAMI Volunteer Policy Statement that outlines expectations, programs and policies for NAMI volunteers, and understand that my relationship with NAMI as a volunteer can be terminated by NAMI or by myself at any time for any reason.
- **Therefore, understanding what is expected of me and what I can expect from HelpLine staff, I commit to _____ (# of hours) hours a week for the next _____ months.**(# of months)

Signature: _____ Date: _____

My HelpLine hours will be: (Day(s) and Hours):

_____

_____

My last day at the HelpLine will be:

_____

Volunteer Contact Information:

Please indicate preferred method of contact:

❑Home Phone_____❑Alt. Phone _____ ❑Email Address_____

StreetAddress_____City_____State_____Zip_____

Name of Emergency Contact: _____

Relationship _____ Contact Phone _____

6.30.11

HelpLine Odds & Ends

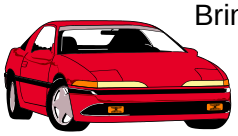
Thank you so much for volunteering with the NAMI HelpLine. We hope these tips will help make your time with us satisfying and enjoyable.

Breaks
Please feel free to take short breaks whenever you need them. Please inform the acting supervisor before you go so that we can cover any calls that might come in your absence.

Break Room: The break room is across the hall from the HelpLine, next to the restrooms. There you will find a kitchenette with refrigerator, microwave and toaster; a table for meals and snacks; a filtered water dispenser inside the refrigerator and vending machines for snacks and cold drinks. Coffee and snacks are provided in the HelpLine; sometimes volunteers bring in additional treats. Volunteers are welcome to any food or lunches left over from meetings that might be in the HelpLine or break room.

Restrooms: The restrooms are directly across the hall from the HelpLine, one for men and one for women. Please do not put any paper towels in the toilets.

Meetings and Briefings: The HelpLine occasionally hosts meetings, training sessions and social activities for our volunteers. Most such events are held in the large conference room on the first floor. Volunteers will be given advance notice of times and locations. If unsure, check with the receptionist the day of the event.



Transportation: The NAMI HelpLine offers free parking to volunteers in the lot behind the office building. Bring your ticket to the HelpLine supervisor each shift for validation. If the lot is full, park on the street and NAMI will reimburse you. Parking is also available in the library lot across the street behind the building, although technically it is restricted to two hours.

Work Stations:
Call Center: The Call Center is the part of the HelpLine where calls are received. Five stations are reserved for volunteer use. Because they are shared among the volunteers, it may not be possible to use the same station each time you come in.

Fulfillment Center: The Fulfillment Center in the basement is where the HelpLine's printed information is stored and where large mailings are prepared and processed.

Your Team Members: As a HelpLine Volunteer, you will work with both staff and other volunteers as a team to achieve the HelpLine mission. Martha Brick, HelpLine Manager (703) 312-7898, is responsible for the overall functioning of the HelpLine and the recruitment of volunteers and interns. Ann Wroth, HelpLine Associate (703) 516-7979, trains and supervises volunteers, keeps the volunteer schedule and answers questions you may have while on the phones. Please keep her informed of your schedule, especially if you are sick or will arrive late. If you plan to go on vacation or will be gone for another reason, please fill out a Leave Notice and give it to her.

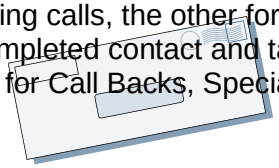
Other HelpLine staff and volunteers are more than willing to answer questions, so please feel free to call on them. Doug Bradley is the HelpLine's full-time Bilingual Information Specialist and handles all Spanish calls, emails and letters, as well as English calls and emails. If you receive a call from a Spanish speaker, transfer the caller to him at **ext. 7886**. Sarah Heckenberg and Loren Booda are part-time staff Information and Referral Specialists. Kate Mallow is a part-time Information and Fulfillment Specialist and is responsible for the HelpLine's weekly mailing. Dawn Brown,(703) 516-7984, HelpLine Content and Development Specialist, is responsible for HelpLine informational resources. All HelpLine staff members answer phone calls and emails and are available to you for questions.

If you need to call in sick or are delayed, please do not just leave a voice mail message. Keep calling until you speak directly with a staff person. Call Ann first; if you don't get her, call Doug. If you can't get Doug, try Martha. If you can't reach any of them directly, please call the front desk at (703) 524-7600 and ask for Dawn Brown, Loren Booda or Sarah Heckenberg. This will make sure that your message gets through to the people who need it, in case the person you leave a message with isn't in that day.

In case of inclement weather or other crisis, NAMI follows the federal government's lead, i.e., if the government is closed, so is NAMI. If the federal government is open, NAMI is also. When the government is open but allows unscheduled leave, NAMI will be open. If you can make it, please come. If not, please follow the steps above to let us know.

Red Notebooks: A **Red Resource Notebook** is located at each phone station. It contains a lot of useful information useful. *Please use the Red Notebooks instead of your Training Manual*, especially for material that is periodically updated. It is much easier for us to update the Red Notebooks than everyone's Training Manual. Please become well acquainted with the material in the notebook and refer to it as needed

Center Table:
The center table is used primarily for contact sheets, tally forms and follow-up sorting boxes. Pick up blank Contact Sheets and the correct tally sheet (one is for incoming calls, the other for voice mail) at the beginning of your shift. At the end of your shift, sort your completed contact and tally forms and distribute them into the appropriate follow-up boxes. There are boxes for Call Backs, Special Handing requests, Standard Mailings and Supervisor Attention Required.



New Publications – Sometimes the HelpLine receives donated material of interest to HelpLine staff and volunteers. Feel free to take any of these publications from the center table. If the publication is for reference only, a white label will indicate it. Copies of new NAMI publications may be displayed for your review here as well.

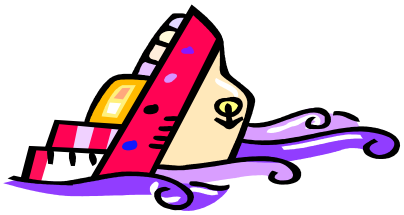
Bulletin Boards – The front bulletin board just inside the HelpLine door posts special event announcements, procedural notices, news items and other important information. Please review it each time you come in to stay up-to-date on HelpLine issues. The small bulletin board by Martha's office holds staff notes, birthday cards, cartoons and the like. Please feel free to check it out.

Leave Notice Forms: To provide quality service to our callers and ensure enough coverage for all HelpLine tasks, management must have written notice of any days that you will be unable to come for your regularly scheduled shift. Leave Notice forms are also on the center table. One should be filled out well in advance of the days you will be absent (at least one to two weeks) and given to Ann Wroth.

General HelpLine Suggestions – We welcome all ideas and suggestions for improving HelpLine procedures and activities. Please jot down your thoughts and put them in the wire basket.

July 2013

Welcome!



Evacuation for Fire and Other Emergencies

1. From time to time the building must be evacuated due to either an actual emergency or a drill. Please hang up politely but promptly if you are on the phone and leave in an orderly, quiet manner. **Meet at the designated place behind the building.** We will assemble there and wait for further instructions. **Exiting the building is mandatory.**

   Staff, volunteers and visitors with physical challenges should refer to item 6 below.

2. For evacuation purposes, the Office Manager is the Office Captain for NAMI. Another designated staff member may assist the Office Manager to complete the evacuation protocol.

3. Unless otherwise notified, all fire alarms should be treated as real. When the fire alarm sounds, exit the building immediately. Exit the suite through the nearest and safest exit. Those on upper floors should proceed to the nearest and safest stairwell, go down to the ground floor and exit the building.

4. If safe to do so, the Office Captain and assistant will conduct a sweep of the office, ensuring that all staff, volunteers and visitors have exited. The Office Captain and assistant will close all individual office doors as they check and clear offices.

5. Assemble at the meeting location behind the building. Do not stray from the meeting location until there are further instructions. **If you are not at the meeting location**, **emergency personnel may conclude that you did not make it out of the building.** People may risk their lives to find you. Do not return to the building until we receive an all clear from the fire department.

6. Staff, volunteers and visitors unable to navigate stairs due to physical challenges should wait next to the elevators. A staff member or a volunteer who is unable to make it to the elevators should position him/herself at the window closest to his/her normal work location so that the fire department can perform a ladder rescue.

Tornado

A tornado warning means that a tornado has been spotted. If a tornado is sighted in the immediate area of the office:

1. Move to the interior of the building away from glass windows.

2. Close your office doors as you vacate the outer offices.

3. Congregate in interior offices on the North side of the building or in a North facing corridor.

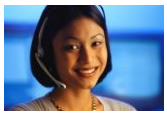
Please Note:

After Training, Please Use the Red Notebooks, Not Your Training Manual

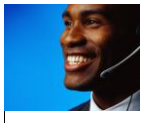
After you finish training, please use the Red Notebook at each phone station for information instead of your Training Manual. We keep 10 Red Notebooks updated with new information, but can't do that for all Training Manuals.

Remember:

The Red Notebooks have the most current information!



Hello, New Helpline Staff or Volunteer, And Welcome!



Please tell us a little more about yourself!

My name is: _____

My Helpline Anniversary Date (the day I started at the Helpline) is:

_____

My birthday is: _____

My favorite colors are: _____

My favorite holiday is: _____

My hidden passion or favorite hobby is:

_____

My Astrological (sun) sign is: _____

If I could do anything in the world, I would_____

_____

Something else I'd like you to know about me is: _____

_____