

Hotline Captain's Guide

Last Updated: October, 2024

Thank you for becoming a captain. Captains are the backbone of the Election Protection Hotline, serving a crucial role supporting volunteers. Captains set the tone for volunteers, and good captains have a huge impact on the volunteer's experience and the program's ability to assist voters.

This guide outlines the typical routine for a captain shift on non-election days. Guidance given on an election day might differ from these procedures as we react to the needs of the moment. Captains should always follow the instructions of leads and hotline staff.

Table of Contents

EXPECTATIONS	1
Your Role	1
Flexibility	1
Teamwork	2
A TYPICAL SHIFT WORKFLOW	2
Before the Shift	2
Start of Shift	2
Throughout the shift	3
Shift Wrap Up	3
VOLUNTEER COMMUNICATIONS AND COACHING	3
Communications	4
BEST PRACTICES	5
Chat	5
Monitoring	5
OVL	5
Questions?	7

EXPECTATIONS

Your Role

The captain's role has four parts:

- assisting volunteers,
- sharing information,
- monitoring hotline operations, and
- quality control.

Volunteer assistance is the core function of captains.

Volunteer assistance is the core function of captains. Captains support volunteers by answering their questions, pointing them to useful resources, and serving as a voice of experience.

Captains should thoroughly know the resources available, both for volunteers and captains.

Captains **share important information**, both to volunteers and to the broader hotline leadership team. Captains help ensure volunteers are aware of announcements and emerging issues. They flag issues and problems up the leadership chain. Captains also help **maintain a nonpartisan environment**, and ensure that volunteers are acting in a nonpartisan manner, both with voters and in chat.

It is essential to know if there are **sufficient volunteers available** to handle the current call volume. Captains help achieve this by monitoring hotline operations in Twilio, ensuring that calls are not being missed and voicemails are returned. Captains also remind volunteers of procedural requirements during the shift, like remaining "available" to take calls, to "wrap" their tasks, and create acceptable OVL tickets.

Flexibility

The hotline is a dynamic operation, therefore daily guidance and procedures may change from the training and this guide. Following lead and staff direction should take precedence.

Captains should also be ready to respond to the needs of the day. Research into emerging issues may be required. If volunteer numbers are insufficient to cover volume, captains may be tasked with taking calls or answering voicemails, so keep your headphones handy.

Teamwork

Captains are part of the hotline leadership team, along with leads and hotline staff.

At times, there is only one captain who performs all duties. When operations scale up to meet the demands of the election season, there may be a team of two or more captains working together to support volunteers. Captains in a team divide responsibilities among themselves, sometimes switching duties during the shift.

All captains should be prepared to perform all functions. Regardless of your primary task when sharing duties with other captains, you should always be aware of the issues coming up in the shift chat, any announcements posted, and call volume fluctuations.

During busier periods, leads are there to support captains. Leads are dedicated volunteers who have mastered the captain's duties and have a deep understanding of hotline operations and election law. If there is a lead online they are your best resource and will work closely with you to ensure things are running smoothly.

Hotline staff are always online during hotline operating hours. When there is not a lead, staff will be available to assist you.

A TYPICAL SHIFT WORKFLOW

Before the Shift

- **Review materials** on EP Legal including:
 - Hot Topics
 - Captain's Log
 - Elections Calendar
- Look for **announcements** and new information on **Captain's Home**.

Start of Shift

Captain shifts start 15 minutes before volunteer shifts to give you time to do the following before volunteers arrive:

- Open Twilio, OVL, , and Rocket Chat and join the correct chat rooms.
- Check the number of voicemails waiting.
- Review the volunteer list for the shift and note any first-time volunteers.
- Check in with the leadership team in All captains and Leads and the shift Captains & Leads chat if that is active.
- Post the Welcome Message in the shift chat.

- If you are working with co-captains, divide responsibilities.
- Greet volunteers and confirm they have signed the Code of Conduct.

Throughout the shift

You will spend most of the shift multitasking between the following tasks:

- Responding to volunteer questions in shift chat
- Posting reminders and announcements for volunteers
 - Use the Chat Tips from the Captains Home on EP Legal
- Reviewing OVL tickets as they are submitted.
 - Pay special attention tickets submitted by first-time volunteers.
 - If you get behind on ticket review prioritize escalated tickets.
- Monitoring volunteer availability and watching for:
 - Volunteers whose status is “unavailable” or “break” for extended periods
 - Tasks in wrap mode for excessive time
 - Calls going to voicemail.
- Assigning voicemails when appropriate
 - Do not assign voicemails before 10 am local time (the caller’s local time based on the state identified in the voicemail message).
- Remaining in communication with the hotline leadership (leads or staff as appropriate)

If you are the only captain on duty during the shift, plan to spend the majority of your time assisting volunteers in Rocket Chat and doing OVL ticket review. If you have divided up responsibilities among a team of captains, remain aware of the issues in the chat and general volunteer availability. Make sure you are still monitoring for and responding to leadership team chats and announcements.

Shift Wrap Up

- About 30 minutes before the end of the shift, post the captain’s log entry.
- As the shift is ending, post the closing message.
- Wait for all volunteers from your team to complete their last interactions, submit their tickets and log off.
- Make sure OVL all tickets submitted during the shift are reviewed.
- Check with the leadership team if anything further is needed before logging off.

VOLUNTEER COMMUNICATIONS AND COACHING

This is the most essential duty of captains, and all captains need to keep a close eye on the shift chat. Volunteers remain engaged with Election Protection because they find the experience rewarding. Captains should work to ensure the experience in the contact center is positive,

engaging, and rewarding for the volunteers on their team!

Communications

When communicating with volunteers in the contact center, remember they are donating their time and may choose not to volunteer again if the experience is not gratifying. Captains help maintain a positive environment by communicating respectfully with everyone in the contact center and responding accurately and with alacrity to volunteer questions.

- Use the Chat Tips to save time and keep guidance consistent
- Nuance may be lost so keep messages in the chat clear and concise.
- It is important to take the time to research a volunteer's question if you do not know the answer.
- It is equally important to respond quickly to volunteer queries in the chat letting the volunteer know that you see the question and that you must research to find the answer.

First-time Volunteers

First-time volunteers are identified as such on the volunteer list. We also ask first-time volunteers to identify themselves in the shift chat to ensure captains know who they are because they may need more assistance and coaching than a seasoned volunteer.

- **Captains should confirm that first-time volunteers have completed the training and signed the Volunteer Code of Conduct.** (The link is on EP Legal.)
- **Captains should also pay particular attention to the OVL tickets of new volunteers to ensure they meet established standards.**

Coaching - New volunteers require coaching and guidance until they develop a solid understanding of where to find specific information on EP Legal and government websites; are familiar with the questions on the FAQ; and know what to do if they have doubts about the information they are about to give.

Coaching has numerous benefits, including:

- Increasing a volunteer's knowledge, skills, and confidence
- Helping them understand and comply with contact center guidelines
- Alleviating a volunteer's concern that they do not have the knowledge needed to help

voters and

- Familiarizing volunteers with the resources available on the EP Legal website.

Remind volunteers that it is more important to provide a **correct** and **complete** answer, than to work quickly and give out bad information. This is particularly true of SMS and webchat interactions which allow the voter to screenshot and share the information.

BEST PRACTICES

Chat

- Careful attention and responsiveness in chat is the core responsibility of all captains.
- If you have to research an answer, respond and let the volunteer know you have seen the question. Volunteers should not be left waiting for more than 2 minutes for a response. (Remember, typically there is a voter on a call waiting for an answer.)
- Guide the volunteer on where to find answers rather than giving them the answer.
- Use the Chat Tips located in Captains Home to save time and keep procedures consistent.
- Alert the leadership team of any problems or major issues.

Monitoring

- Closely monitor the Teams Tab in Twilio for volunteer availability and task assignments.
 - Filter so you are not seeing “offline” users
- Periodically check Queue Stats for missed calls and voicemails.
- If you assign voicemails during your shift, be sure to turn off the skill before the end of the shift.

OVL

OVL QC Checklist

- Escalation
 - Should it have been escalated?
 - If it was, did they check with a captain first?
- Location
 - State and County

- Polling Place Location (if applicable)
- Guidance to the voter
 - Correct
 - Was the correct information given?
 - Complete
 - Does the ticket have complete information including the voter's question and the answer given
 - If the voter calls back, does the ticket have enough information clearly written that a different volunteer would be able to help the voter with any follow-up needed.
 - Can EP Coalition Partners understand the issue based on the information in the ticket.
 - Concise
- No PII (Personal Identifying Information)
 - PII is any information in the ticket narrative that could identify the VOTER in a small town.
- No partisan language
 - Unless needed for clarity, intimidation, misinformation or electioneering issues.
- Issue tagging is correct and complete

Hotline Escalation Criteria

NOTE: This is general guidance. The details obtained from voters will determine if specific issues are escalated.

Only first-person reports should be escalated.

Issues that do, or could, prevent large numbers of people from registering/voting.	<u>ALWAYS</u>
Eligible voters prevented from registering/voting	<u>ALWAYS</u>
Misinformation/Disinformation	<p><u>Escalate if:</u></p> <ul style="list-style-type: none"> • first-person account by the voter who experienced it or person who witnessed it <p>AND</p> <ul style="list-style-type: none"> • Likely to impact other voters and prevent or dissuade them from voting.
Official State Resource Broken/Incorrect	<p><u>Escalate if problem could prevent voters from:</u></p> <ul style="list-style-type: none"> • Registration • Obtaining essential voting information • Ability to vote, including absentee
<p>Polling Place Issues: Access Issues</p> <ul style="list-style-type: none"> • Language-prevented from having assistance • Disability-lack of access to polling place, dropbox or ballot 	<u>ALWAYS</u>
<p>Polling Place Issues: Infrastructure Failures</p> <ul style="list-style-type: none"> • Ballot problems, including running out of ballots • Equipment problems • Delayed start/early close 	<u>ALWAYS</u>
Polling Place Issues: Intimidation	<u>ALWAYS</u>
Polling Place Issues: Long Lines	<p><u>Escalate if:</u></p> <ul style="list-style-type: none"> • 45 minute or longer wait • Safety concerns, weather or otherwise • People are leaving the line
<p>Polling Place Issues: Poll worker</p> <ul style="list-style-type: none"> • Misbehavior • Substantive errors 	<u>ALWAYS</u>

Polling Place Issues: Safety Concerns	<u>ALWAYS</u>
Provisional ballot Issues: Improper use by poll worker <ul style="list-style-type: none"> • Offering inappropriately • Failure to offer when warranted 	<u>ALWAYS</u>
Vote By Mail Issues: Ballot/Envelope Problem	<u>Escalate if:</u> <ul style="list-style-type: none"> • Issue could prevent vote from being counted • Ballot incorrect for that voter's district/precinct
Vote by Mail Issues: Ballots Not Received <ul style="list-style-type: none"> • By voter to vote • By board of elections after voted 	<u>Escalate if:</u> <ul style="list-style-type: none"> • Appears to be a trend • Very close to return deadline

OVL Tips

- **Escalated tickets are first priority;** jump ahead and review those right away.
- Use the **QC Problem button** to flag tickets where corrections or additional information is needed. (Then work with the volunteer to ensure necessary additional information is added to the ticket.)
- **Carefully check tickets that are escalated or have complex issues and those submitted by new volunteers.**
- **Be constructive** in volunteer coaching, and mindful of call volume and instructions given in chat.
- When **editing tickets**, add an update in the ticket notes indicating any new information or major changes.
- Changes and updates to ticket narrative details should be added to the narrative sections (call description and call outcomes); other information can be added as a comment.

OVL Red Flags
Issues that should prompt extra review

Some issues or outcomes should serve as a red flag when you are reviewing tickets. Tickets with one of the outcomes below should be carefully reviewed to ensure the information given to the voter was correct. You may need to go beyond normal QC

review and refer to the state FAQ. Take the time to confirm the call outcome was correct for both law and hotline procedures in tickets where:

- The caller was told (by the volunteer) to use a provisional ballot
- The caller told (by the volunteer) that they can't vote
- There are reports of significant polling place problems
- The caller's question is about arrest/conviction
- Registration issues in states with same day registration

Questions?

Refer to the [Captain resources](#) on EP Legal or get support from leads and/or staff. Don't hesitate to ask if you need anything.