



For Decision-Makers: Preparing Advocates for Digital Services

“Digital services” means using technology tools like online chat, text messaging, and video calls to provide services to survivors. There’s more to offering digital services than just buying the right software. Programs must first invest time and energy to assess their readiness to provide digital services, and develop strong policies and procedures that will ensure high quality services that are centered in victim safety and privacy.

Your program should consider your unique circumstances, such as applicable laws, available resources, current practices, and other local considerations, when designing a digital services advocacy program.

This checklist is meant to help you prepare your program for providing digital services, or to strengthen what you’ve already put in place. For more information, we encourage you to check out these resources from our [Digital Services Toolkit](#).

- Assessing capacity and readiness: [Guide](#)– [Webinar Recording](#)
- Deciding what kinds of tools to use, such as chat or video: [Guide](#)– [Webinar Recording](#)
- Best practice principles and technology-specific recommendations: [Guide](#) – [Webinar Recording](#)
- Quick version for the COVID-19 Pandemic: [Guide](#) – [Webinar Recording](#)

The following checklist includes three steps:

- Step 1: Adapt policies and practices
- Step 2: Make key decisions
- Step 3: Train advocates

Step 1: Adapt Policies and Practices

Start with what you know. Go through your program's existing policies and practices for phone and in-person services, and ask yourself: "What would be different for digital services? What would be the same?"

Here are some key things to keep in mind as you do the review:

- Risks include:
 - The conversation could be intercepted by someone else including an abusive person,
 - An abusive person could impersonate a survivor, or
 - A survivor's privacy and your programs' confidentiality obligations could be undermined.

Read more about risks and approaches to [chat](#), [video](#), and [text messaging](#).

- Text and chat conversations tend to include more numerous and more graphic disclosures. Plan for additional support and debriefing for advocates.
- Text and chat conversations tend to be longer in duration. As a result, you may need to adapt staffing schedules, make decisions about whether advocates will hold more than one conversation at a time, decide how advocates can hand off a conversation at the end of their shift, and support advocates in maintaining work-life balance.

See our [Best Practice Principles](#) for more information, or view a [webinar recording on this topic](#).

Step 2: Make Key Decisions

There are many specific decisions that will need to be made as you set up technology tools and train advocates for digital services. Use this list of questions to consider many key decisions.

Capacity

- Will you use the technology tools for your hotline, for ongoing advocacy, or for online groups? If it will be for ongoing advocacy or groups, what kind of messages or conversations (for example, reminders or crisis support)?
- What days and times will the service be available? What message will a survivor see if the service is closed or the queue is full?
- Will the service be marketed to specific communities, populations, or through your partner organizations?
- What will an advocate do when someone contacts your program from outside of your geographic service area, including another state or country?
- How many conversations will an advocate take at one time, and will they be in more than one format (for example phone, text, chat)?
- In the tool itself, how can advocates tell multiple conversations apart that are overlapping or happening at the same time?

Read more about [Assessing Capacity for digital services](#) and [Providing Quality Digital Services](#).

Managing Services

- When and how will an advocate transfer a conversation to another advocate or to a supervisor, for example at the end of a shift? [Learn more in Best Practice Principles](#).
- How will your program collect data about digital services? What data will you collect? How will you know if the service is successful? [Learn more about protecting survivor privacy by collecting minimal information](#).
- Will you offer satisfaction surveys? How will you support survivor safety and choice when offering those? [Learn more about protecting survivor privacy by collecting minimal information](#).

- What features of the technology tools will you turn on or off? What guidance will advocates need about how to use those features? [Learn more about assessing the features of tools for digital services.](#)

Conversations

- How will advocates do standard safety and privacy checks, including about a survivor's technology? [Learn more about talking with survivors about safe ways to communicate.](#)
- Text and chat conversations can sometimes be more informal. What kind of tone do you want advocates to take? How important is spelling and grammar? Should they use emojis or acronyms? [Learn more about clear communication.](#)
- How will advocates provide referrals and links? Will those referrals be different than the list you already have?
- Will advocates automatically close a conversation after a certain amount of time with no reply from the survivor, or if they indicate that an abusive person has entered the room? What is that amount of time? [Read more about closing conversations.](#)
- If written consent is needed for a release of information, how will an advocate obtain that? Read more about [Digital Written Consent](#).
- How will your program respond to incoming messages via [text message](#), [social media](#), or other formats that are less secure or not secure?
- How will an advocate respond to messages in languages you don't have capacity for? [Learn more about clear communication.](#)
- What will advocates do if there is a threat of harm to self or others, if applicable based on your local and state laws? [Read more about supporting survivors' informed choices.](#)

Supervision & Challenging Situations

- How will supervisors help advocates adapt to digital services?
- How will supervisors give support after conversations with intense content?
- How should advocates handle abusive content or suspected impersonation?
- What will you do in unexpected circumstances like a natural disaster?

Read more about [Supporting Advocates](#) and [Planning for the Unexpected](#).

Canned messages are standard phrases, links, or information that can be copied and pasted into text and chat conversations. These messages can be very helpful to advocates and help provide consistent information to survivors. Here is a list of messages to draft:

1. Safety check, including safety of devices and accounts. [Learn more about talking with survivors about safe ways to communicate.](#)
2. Survivor's rights, confidentiality, and what to expect from your program and digital services.
3. What will happen or what to do if there is an interruption in the conversation due to technology or other reasons.
4. A message if they are waiting in a queue, or the service isn't available.
5. Pre-translated messages for survivors who reach out in languages your program doesn't have capacity for.
6. Tips and information to share with survivors about how to use the tools you have chosen. (These could be from the company if that information is clear and in plain language.)

Step 3: Adapt Training

As you plan training for advocates getting ready to provide digital services, there are two parts to consider. The first part should cover the basics of how to use the

digital services tool(s), and how to record the service in your database. The second part should focus more on adapting skills and practices to digital services.

Training on the digital services tools should be tailored to the specific tools your program is using, including:

- How to select, start, and end a conversation.
- How to send messages, use canned messages, and share links and referrals – including how a survivor can access links once the conversation closes or messages are deleted.
- How to hand off conversations, for example at the end of a shift.
- How to protect and clear devices for privacy and confidentiality.
- How to record the service, including guidance to keep minimal notes, as with a phone call, and to not save the whole conversation.
- Who to contact for help with the tool, for example, customer service or your program’s IT staff.
- How to roll over the line or service to other services in event of a disaster.

Training on how to adapt advocacy skills and practices to digital services should be based on the decisions you made in Step 2, and include:

- Chat and text etiquette,
- How to do a safety check, every time,
- Informed consent online,
- Active listening and the elements of a conversation (responding promptly, asking open-ended and closed-ended questions, using reflection, empathy, paraphrasing, and validation),
- A reminder to not collect evidence for survivors,

- What to do if survivors want to save the conversation,
- What to do in emergencies, including how to remind survivors of mandatory reporting or other reporting requirements,
- When and how to close a conversation when time has elapsed,
- How to deal with abusive contacts or suspected impersonation,
- What to do if emergency services or a legal request for information about services, and
- How to reach out for debriefing or supervision check-ins.

Finally, advocates should be given opportunities and reminders to practice the new tools and skills with each other, and to see what the tools look like from the survivor's point of view, including survivors who use assistive technology like screen readers, for example.

Learn & evolve

As a field, we are learning how to weave these newer technologies into our advocacy work. We're all learning and evolving. Note and discuss what you're learning about best practices within your program and with colleagues.

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