

EVI
EMERALD VALLEY INTERGROUP

EVI STEERING COMMITTEE MEETING

01 September 2003

APPROVED DIVERTER POLICIES & PROCEDURES

PROGRAM OBJECTIVES

1. Maintain an uninterrupted EVI Telephone Answering Service on a 24/7 basis.
2. Volunteers drawn from the total EVI membership.
3. Program coordination by the Diverter Committee under the auspices of the EVI Steering Committee.

NEW DIVERTER PROGRAM

The list below summarizes the items that will have to be addressed in order to meet the objectives stated above.

1. The EVI Office will change the weekday closing time from 5 PM to 5:30 PM in order to provide time for arranging a replacement volunteer should the scheduled volunteer not pick up the Diverter at 5 PM. The time for normal transfer of the phone answering service from Office to Home Volunteer will remain at 5 PM.
2. A Diverter Committee will be set up, will take over all aspects of Diverter coordination, and will report monthly to the EVI Steering Committee.
 - a. The Diverter Committee will comprise the EVI Diverter Coordinator, the EVI Diverter Co-Coordinator, and representatives from the following groups: i) volunteers assigned to the home telephone answering service; ii) Group Diverter Representatives; iii) the EVI Steering Committee; and iv) the Office volunteers.
 - b. The Committee Chair and Co-Chair's elections will be conducted as prescribed for other EVI committees and will rotate in March annually.
 - c. The Diverter Committee will meet at least once per month on a regularly scheduled basis (currently 10AM, on the 2nd Saturday of each month, at the EVI Office).
 - d. The Diverter Committee Chair should have a standing mandate to attend EVI Steering Committee meetings as well as Business meetings.
 - e. The Diverter Committee will define the roles of the Diverter Coordinator, the Diverter Co-coordinator, the Group Diverter Representatives, and the Phone-answering Volunteers.
 - f. The Committee will prepare a consistent set of policies and procedures for guiding the administration of the Diverter function.

- g. The Committee will draft a Diverter “Code of Conduct” (COC) that will guide volunteers performing Diverter work. The Diverter COC will be read and signed by all volunteers before going on phone answering duty. The current H&I COC will serve as a guide for drafting the Diverter COC. The Diverter COC will be cleared with the EVI Steering Committee before going into use in order to ensure that the COC addresses good Program administration as well as the rights of volunteers involved. Guidelines for removing volunteers must be fair and include an appeals process that will be spelled out in the Diverter “Code of Conduct”.
- h. The Diverter Committee will develop a new 12th Step list under new guidelines for posting volunteers to that list.
- 12th Step List volunteers will be recruited based on their proven performance in past 12th Step activity or as volunteers in other EVI service work. The List will be limited to about 20 men and 20 women, with consideration for including volunteers from each major geographical district within the EVI area. Recruitment will be by individual application rather than sign-up lists. The Group Diverter Representative will be instrumental in recruiting 12th Step List volunteers.
 - It is recommended that the only data published in the 12th Step List be name, gender, telephone number, daytime or evening availability, and residence area.
 - It is further recommended that 12th Step volunteers be prepared to take on full responsibility for making 12th Step calls and that these experienced volunteers take along partners of their choice that may, or may not, include newer members of AA.
 - Inclusion on the 12th Step List may be revoked if a volunteer cannot be reached by telephone after 3 successive tries, or if any volunteer refuses to make a 12th Step call when requested to do so.
 - A list of “Do-s and Don’t-s” along with some guidelines for 12th Stepping will be drafted by the Diverter Committee and included in the revised Diverter Packet which will be distributed to all diverter volunteers, the EVI Office, and those on the 12th Step List.
- i. The Diverter Committee will review and analyze the existing Diverter Packet to determine whether major changes to the document are justified. If no major changes are deemed necessary, the Diverter Coordinator will clean up the document and republish as appropriate. At a minimum, the Packet should contain: i) directions for using the telephone diverter function; ii) a full set of crisis line numbers; iii) an updated 12th Step List; iv) an area map for guiding people to meetings; and v) a current Meeting Directory.
- j. A Monitoring Program will be set up by the Diverter Committee to check on the maintenance of uninterrupted Diverter service as well as the adherence to EVI Diverter policies and procedures. The procedures for monitoring will be developed by the Diverter Committee and approved by the EVI Steering Committee. The EVI Diverter Coordinator will be responsible for monitoring activity.

- k. The Diverter Committee will develop a simple training program for new Diverter Coordinators and home answering service volunteers.
3. Diverter volunteers will be recruited from the entire EVI membership in much the same manner as volunteers are recruited for work in the EVI Office. Volunteers will submit individual applications rather than putting their names on sign-up sheets. The current "Application for EVI Service Work" form may be used for this purpose. Group Diverter Representatives will actively recruit for the Program. However, there will also be provision for submitting applications to the EVI office, or directly to the Diverter Committee Chair, in cases where prospective volunteers belong to a Home Group without a Group Diverter Representative.
 - a. As a first step in making changes to the current Diverter program, the present Group Diverter Representatives may wish to continue to man the Diverter personally, or to ask members of their Groups to continue to take the duty. This will be the first priority in recruiting under the new Diverter policies and procedures. Volunteers should be informed that they will be expected to perform their services in line with approved Diverter policies and procedures, as administered by the EVI Diverter Coordinator. Thereafter, volunteers will be recruited more and more from a larger segment of EVI membership in which old and new Group Diverter Representatives will share recruitment duties with members of the Diverter Committee.
 - b. Volunteers will be expected to perform their services from 5:00 PM to 9:00 AM on weekday nights, and as prescribed on Saturdays and Sundays. There will be two duty positions for each night of the week. (Sundays may be covered by two shifts of two-person crews). The Primary Volunteer will take the phone answering duty for the full night (or Sunday shift). The Backup Volunteer will stand in for the Primary Volunteer whenever the Primary Volunteer cannot handle the duty. On nights when the Primary Volunteer does take the duty, the Backup Volunteer will still be expected to be on hand in order to cover for unexpected emergencies.
 - c. Provisions will be made for rotation of volunteers on a reasonable time schedule, to be determined by past "burn-out" trends. It is recommended that volunteers work a 2-month rotation period; the first month as Backup Volunteer and the second month as the Primary Volunteer.
 - d. The assignment of 2 volunteers per duty night (or Sunday shift), coupled with a specific rotation period for volunteers, adds predictability to the Diverter program and will greatly facilitate the EVI Diverter Coordinator's ability to schedule specific volunteers for duty assignments at least one month in advance. The assignment of 2 specific volunteers per duty session will also allow the Diverter Coordinator to take prompt action to cover shifts when system breakdowns occur.

JUSTIFICATION FOR RECOMMENDED CHANGES

Justification for making changes to the current Diverter Program, now operated by selected Groups within EVI, may be summarized into three major headings; 1) The benefits and failings of the **current system**; 2) the failure to reconcile problems through **actions taken to date**; and 3) a **diverter systems comparison analysis** showing that the majority of other Intergroup systems produce good results with far fewer problems than our current system.

CURRENT SYSTEM

For some time now, EVI has operated a phone answering service that allows callers to directly contact a fellow AA member for information or 12th Step help. This system has been praised on many occasions and has adequately served our primary purpose of reaching out to the alcoholic who still suffers. However, breakdowns in the system have occurred that negatively affect telephone answering service uptime. It's time to look at some of the things that might be improved in the way we operate the EVI Diverter.

Over the past two years, there have been an average of 10 Diverter service interruptions per month based on comments made in the EVI Office Diary. This indicates a 70% system efficiency. However, this figure is more than likely over-stated due to the fact that the records only reflect the problems experienced during the office to home transfer and do not include problems that might have occurred during the wee hours of the night.

The most common problem has been the failure to smoothly transfer the Diverter from office volunteers to home volunteers at EVI Office closing time. Other problems include: 1) gaps in service between volunteers splitting the duties on any given night; 2) inability to contact a suitable 12th Step volunteer from the 12th Step list, 3) lack of ability to prepare and post realistic monthly Diverter schedules in the EVI Office; 4) confusion as to the correct weeks of assignment for individual Groups; 5) rapid burn-out of relief volunteers and coordinators after endless nights of taking the Diverter due to slippage by assigned volunteers; and 6) non-availability of Diverter service work for EVI members not in the currently assigned Groups.

In sum, problems may be attributed to: 1) the way the service is organized; 2) the way the service is coordinated; and 3) the lack of a standard system for appointing volunteers to the program and removing volunteers that either burn out or fail to perform.

The present Diverter organization is complex. Although the activity is an EVI program, the system has long been in the hands of 13 Groups that have had only tenuous communication with the EVI Steering Committee and Business Group. It is intended that the EVI Diverter Coordinator and Co-Coordinator provide this communication link, but these volunteers do not have direct contact with the volunteers actually performing the service and are thus not effective in this regard.

Of the 13 assigned groups, one group takes Sundays. The other 12 groups cover the other nights of the week, with 2 groups covering any given weeknight. For example, Monday Group A covers the first, third, and fifth Monday while Monday Group B handles

the second and fourth Mondays. In some cases individuals, not assigned to any specific Group, cover odd shifts.

This complex organization leads to complex operating procedures as well. Each group has a coordinator. The Group Coordinators sometimes assign telephone-answering duties to volunteers on a two-hour shift basis rather than having one person on for the evening. Having the two Groups assigned to each weeknight sometimes makes it difficult to determine which Group has any given night; especially if the groups have made internal arrangements to swap their duty nights. Some volunteers have been known to receive their calls on answering machines. As a result there have been many instances where the phone has not been manned, and it has proved impossible for the EVI Diverter Coordinators to track down who should have been on the phone.

At present, Group Coordinators have their own systems for appointing volunteers to Diverter work and removing volunteers who do not perform. There are no consistent EVI policies for doing these things. There is no standard Code of Conduct for dealing with callers. There is no rotation policy for Diverter work. There are no specific sobriety requirements for assigning volunteers. There is no EVI-wide procedure for monitoring the performance of Diverter volunteers. There is no provision for removing a volunteer who has been delinquent in taking his/her shift or acting improperly while on duty.

In addition to the above, there are problems that relate to the tools needed in order to perform Diverter work and to training of volunteers.

The basic tools of the trade are the 12th Step List and the Diverter Packet.

The 12th Step List has been used in the past as a means for contacting volunteers to take on 12th Step telephone calls and visits. The List has been updated several times but does not stay updated for very long. Volunteers from both the office and the home answering services have had considerable trouble finding volunteers to take on 12th Step service despite calling dozens of people listed. The most common problems are disconnected lines, unanswered lines, and persistent answering machines. In some cases, potential volunteers that have been reached refuse to take on 12th Step work for reasons of their own.

The Diverter Packet has been in use for some time now to aid the home answering service volunteer. The Packet serves as a guide for handling information requests and for putting callers in contact with 12th Step volunteers. It has been said that the Diverter Packet is not helpful to home volunteers in its present form.

At present, Group Coordinators individually train their Diverter volunteers. There is no consistent EVI policy for training people to handle the home telephone answering service.

ACTIONS TAKEN UP TO END AUGUST 2003

In order to try to improve things, the former Diverter Coordinator called a meeting of telephone-answering volunteers on Saturday, May 10th, to discuss possible improvements that might be made. The meeting was poorly attended. Another meeting convened on May 17th and was poorly attended as well. The Agenda for both meetings included: 1) telephone-answering service situation and recommended improvements; 2)

procedures for up-dating the 12th Step List; 3) Diverter Packet improvements; and 4) training for new telephone-answering volunteers.

On Monday, 2 June, the EVI Steering Committee appointed an *Ad Hoc* Committee to investigate the problems involved and to make a proposal to the Steering Committee for improving the situation. On 26 June, the Committee convened to initiate activity on the task given. (Meeting Minutes available on request)

The 26 June meeting was also not well attended. It would be unfair to reach conclusions and make proposals without the participation of a good portion of the Group Coordinators. For this reason, another meeting was scheduled for 19 June 2003.

On Saturday, 19 June 2003, the second Diverter Ad Hoc Committee meeting convened in the EVI office. Attendance included 4 Group Coordinators and 3 representatives for Group Coordinators. Also present were the EVI Steering Committee Chair and Co-Chair. The meeting devolved to general discussion about how Group Coordinators were handling their jobs, but little came up as to possible improvements to the system. It was suggested that the Chair, Diverter AD Hoc Committee make a draft proposal to the Steering Committee for making improvements to the Diverter program and hold one more Ad Hoc Committee meeting to discuss the draft proposal point-by-point in order to reach consensus on the proposal. (Meeting Minutes available on request)

The last EVI Diverter Ad Hoc Meeting was held on Saturday, 16 August, at 10 AM in the EVI Office. The Draft Proposal to the Steering Committee was discussed and finalized. The Proposal, as amended at the meeting, was approved unanimously by the Ad Hoc Committee members present. (Meeting Minutes available on request).

DIVERTER SYSTEMS COMPARISON ANALYSIS

It has been recognized that there is need to make improvements to the present Diverter Program. However, there may be disagreement as to the type of changes that should be made. The following discussion is designed to show the criteria for a model Diverter Program and compare that model with the current EVI system and with other Intergroup Diverter programs.

The following table summarizes these comparisons.

Table 1
Diverter System Comparisons

<u>Model System</u>	<u>Existing System</u>	<u>Other Intergroups</u>	<u>Proposed System</u>
24/7 access to an AA member	24/7 access to an AA member	Most have 24/7 but some use professional services	24/7 access to an AA member
Consistent policies & procedures	Varied policies & procedures	Most with consistent policies & procedures	Consistent policies & procedures
Intergroup coordinated system	Selected Group coordinated system	Most with Intergroup coordinated system	EVI coordinated system

Volunteers from total Intergroup membership	Volunteers from selected Groups	Most with volunteers from total Intergroup members	Volunteers from total Intergroup membership
Model System	Existing System	Other Intergroups	Proposed System
Volunteers perform the work as prescribed	Group Coordinators adjust work content and schedules to suit individual volunteers.	Volunteers perform the work as prescribed	Volunteers perform the work as prescribed
Monitoring Program to maintain Program consistency	Varied loose monitoring procedures	Most have monitoring programs at the Intergroup level	Monitoring Program to maintain Program consistency
Set volunteer rotation schedules	No volunteer rotation schedules	All have some sort of volunteer rotation schemes	Set volunteer rotation schedules
Code of Conduct or other guidelines for terminating volunteer services	No guidelines for terminating volunteer services	Most have some set of guidelines for terminating volunteer services	Code of Conduct for all aspects of volunteer work
Advance volunteer scheduling of at least one month	Little to no advance volunteer scheduling	Most can post monthly diverter schedules in advance	Advance volunteer scheduling of at least one month
Reliable 12 th Step List available to diverter volunteers	12 th Step List not reliable	Most have some form of 12 th Step List	Reliable 12 th Step List available to diverter volunteers
Functional Diverter Packet available to diverter volunteers	Diverter Packet considered not functional by some	Some form of Diverter Packet available to diverter volunteers	Functional Diverter Packet available to diverter volunteers
Structured training available for new diverter volunteers	Training variable as determined by individual Group Coordinators	Training variable and ranges from none to training by Diverter Coordinator or Diverter Packet.	Structured training available for new diverter volunteers

The following paragraphs give detailed descriptions of the various diverter systems shown in the above table.

Model Diverter Program

The model Diverter program should comprise the following elements:

1. Ensure that callers seeking information or 12th Step assistance will be able to talk directly with an AA member. Maintain an uninterrupted 24/7 system.

2. Program guided and directed by a consistent set of EVI policies and procedures including a "Code of Conduct" to be read and signed by volunteers performing the work.
3. All program and committee activities will be accurately reported to the EVI Steering Committee and EVI Business Meeting monthly. (Replaced Item 3)
4. Diverter volunteers drawn from the entire EVI membership.
5. (Removed Item 5 – Covered by Signed "Code of Conduct")
6. Program monitoring procedures designed to ensure consistent service and adherence to EVI policies and procedures.
7. Provisions made for rotation of coordinators and volunteers on a reasonable time schedule determined by experienced "burn-out" trends.
8. Guidelines in place for removing volunteers who prove unreliable or who violate the Diverter "Code of Conduct".
9. Ability to schedule specific volunteers for duty assignments at least one month in advance.
10. Availability of an updated 12th Step List that contains the names and numbers of reliable AA's who are able and willing to perform whatever service is necessary in order to reach out to the suffering alcoholic.
11. Availability of an updated Diverter Packet that contains directions for using the telephone diverter function and a full set of crisis line numbers. A current Meeting Directory should be considered part and parcel of the Diverter Packet.
12. Structured training program for new Diverter coordinators and answering service volunteers.

EVI Diverter Program - Current Status Summary

1. EVI maintains a 24/7 human voice telephone answering service with service interruptions approximating 30% of the evening hours scheduled. Main problem is the lack of ability to make a smooth transfer from the office volunteers to the home volunteers at office closing time.
2. No stated EVI policies and procedures. Each Group has its own set of ways to run their answering service. No Code of Conduct has been provided to Diverter volunteers.
3. Program now coordinated 13 different ways by 13 Group Coordinators. The EVI Diverter Coordinator and Co-Coordinator are not in the communications loop between Group Coordinators and the volunteers answering the phones.
4. Diverter service work is limited to volunteers recruited from 13 Home Groups. (With infrequent exceptions)
5. Each Diverter Coordinator has his/her own way of running their Diverter program. This is heavily influenced by the wants of individual volunteers who dictate the hours that are willing to stand duty. The limited source of volunteers within any

one Group makes it necessary to do what the volunteers say they are willing to do, rather than maintain a model system without folk to run it.

6. Diverter Coordinators have devised their own systems for monitoring volunteer performance. Some have been successful and some not so. Every change of Group Coordinator leads to changes in monitoring methods.
7. There are no rotation systems established for the Diverter Program. Coordinator and volunteer "burn-out" is painfully evident.
8. The ability to terminate volunteers for lack of performance (or other reasons) is dependent upon the personality of each Group Coordinator. The EVI Diverter Coordinators do not have sufficient contact with phone-answering volunteers to play any role in chastising folk for non-performance.
9. There are now varied and inconsistent scheduling procedures for volunteers. Many volunteers are recruited the night they will take duty. It is impossible to post an advanced schedule of those who will answer the phones. The current system relies upon the Group Coordinator to detect breakdowns and find replacements to fill gaps in the duty schedules. However, this duty normally falls onto the EVI Diverter Coordinators who have no idea who was supposed to be on duty. Replacement volunteers are recruited at the moment of crisis. Failing that, the EVI Diverter Coordinator takes on the duty his/her self.
10. The 12th Step List on hand was last updated in September 2002. It took months to make that update. Only a fraction of the people on the List can normally be reached and many refuse to accept responsibility for taking on 12th Step work when contacted. The List has gone out of use by both office and home volunteers. It seems that the next update should be done using different criteria for including people on the 12th Step List.
11. The current Diverter Packet seems to cover the essentials but it has been criticized as useless for training new volunteers.
12. There are no structured training programs for new Diverter Volunteers. Each Group Coordinator takes on the task of training new volunteers. Training is heavily dependent upon the quantity and quality of the individual Group Coordinator's experience.

The Diverter Function in Other Intergroups

1. Most not 24/7. Some Intergroups hire professional dispatching services. Those Intergroups, that maintain a 24/7 service with volunteers, assign one volunteer per night with varying emergency coverage and rotation arrangements. Few Intergroups use a Group-coordinated volunteer answering service. They are normally new Intergroups with limited membership.
2. Most Intergroups have some form of policies and procedures that guide and direct their Diverter programs. Have not been able to determine whether or not any Intergroups use a formal Code of Conduct for volunteers performing this type of service work. The EVI Hospitals & Institutions service group does use a

comprehensive Code of Conduct that might be suitable for use in our Diverter Program.

3. Most Intergroup Diverter programs are coordinated at Steering Committee level to ensure consistency in program implementation and conformance to Intergroup policies and procedures.
4. Diverter volunteers drawn from the entire Intergroup membership.
5. Volunteers are normally selected by ability to do the prescribed work. With few exceptions, prescribed work schedules and job content are conditions of volunteer work and are not changed to suit personalities.
6. Most Intergroups have comprehensive monitoring procedures designed to ensure consistent service and adherence to Intergroup policies and procedures. In the one case noted, that coordinates the Diverter function by Groups, the Intergroup Steering Committee performs the performance monitoring.
7. All Intergroups contacted had some form of rotation system for volunteers in their Diverter programs.
8. Most Intergroups have expressed the fact that the termination of volunteers for non-performance is a sticky issue and is handled on a case-by-case basis.
9. All Intergroups that maintain functioning Diverter programs state that they have the ability to schedule specific volunteers for duty assignments at least one month in advance.
10. Most Intergroups have developed some form of a 12th Step List and report varying levels of success in their usage. Most say that smaller lists of people known for their past performance have proved more successful than large lists that contain everyone that wants to be on it.
11. Most Intergroups have their own form of Diverter Packet. The description of these documents indicates that they are very similar to the EVI Diverter Packet.
12. Very few Intergroups conduct structured training programs for new Diverter coordinators and answering service volunteers. However, most have some form of training administered by their Intergroup Diverter Coordinator.

Respectfully submitted,

Bob E.
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Committee