

Providing support by phone or video: some practical guidance for NGO support workers

This resource is for people working in non-government organisations (NGOs) who want guidance for moving to phone or video support with someone they are currently working with.

Why use phone or video?

Phone or video calls are useful when you can't be in the same place as the person you support. Phone and video calls allow you to continue supporting the person while reducing the risk of spreading COVID-19.

How are they different from face-to-face?

Many people are new to phone or video support and may be uncertain about how it works or have some concerns. Being aware of these concerns can help to identify ways to reduce them and ensure you give the best support possible.

When using phone or video calls, think about:

- › how will the person feel about working together in this way?
- › how can this impact on the person and your ongoing relationship?
- › how may this change the way you communicate and provide support?
- › how will you maintain confidentiality for yourself and the person?

Things to be mindful of when moving to phone or video support

It is important to be yourself and follow good practice just as you would during face-to-face contact.

This type of communication may be new to your relationship with the person, so it might feel awkward or different at first and that is okay. This will get easier as you go, and people will become more comfortable with this new way of connecting.

Take a moment to review engagement resources, such as [values informed practice](#) and [engagement essentials](#) which are part of [Let's get real](#).



Preparing for a phone or video call

Here are some steps you can take before a call to make sure everything runs safely and smoothly.

Planning ahead

- › Make time to ensure the person has all the information they need and check if they have any questions or concerns. This can be by text, email, or an initial phone call if appropriate. This includes:
 - ▶ explaining how phone or video is similar to and different from face-to-face
 - ▶ checking if the person has access to a phone or computer, internet data and a good connection
 - ▶ providing clear and simple instructions on how to access video calls.
- › Consider how you will need to adapt to meet the person's cultural, language and communication needs.
 - ▶ What language does the person prefer?
 - ▶ Does the person have a hearing or vision impairment?
 - ▶ Who else may be useful to have in the call?
 - ▶ Is the person familiar with using technology?
- › Check your organisation's requirements for confidentiality, security and getting informed consent. Do you need written, verbal or electronic consent?
- › Use your work phone or computer. If this is not possible talk to your organisation about appropriate steps.
- › Use programs or apps approved by your organisation. Avoid using personal accounts on social media apps, such as Facebook and Messenger, as these are not secure or confidential.
- › If video calling, use an audio headset and a fast, secure internet connection, where possible, to improve the quality of the contact.

Before a call

- › Test your equipment and practice with co-workers, if needed.
- › Be mindful of how you will sound and appear on screen. Find a space that is well lit and reasonably quiet. Make sure your laptop or webcam is placed at eye-level.
- › When working from home, make sure there are no inappropriate background distractions, ask whānau or flatmates to respect the privacy of the call and make sure there will be no interruptions.
- › Send a quick text or email reminder to confirm the call. Remind the person to test their equipment, choose a private space if available and write down any questions they may have for you.
- › Make a back-up plan in case of technical issues, for example reconnecting via text, email or phone. Be prepared for things to not work at times and be kind to yourself.

Make time to help the person understand how the technology works.

Become familiar with your equipment and program to prevent issues.

Use technology safely to maintain privacy and professional boundaries.

During a phone or video call

Remember to be yourself. Focus on engaging with the person and building a good relationship.

Acknowledge the current COVID-19 situation. Give the person time to express how they feel without rushing them. Reassure the person that things are different right now and it's okay if this is having an effect on them. You can share helpful resources, like the [Ministry of Health's](#) mental health and wellbeing resources.

Starting a call

- › Start by introducing yourself and confirm you are speaking to the right person. Check if the person is ready to start the call and encourage them to let you know if they become uncomfortable or need to end the call.
- › Ask about the person's day to help you both settle into the conversation. Describe where you're calling from and have a chat about the expectations you both have for this call. For example, I'm calling from my home and the sun is shining here. How would you like to spend our time today? Do you have something on your mind you want to talk about?
- › Check the sound and/or video quality. Can you clearly see and hear each other? Do you need to make any adjustments?
- › Pay attention to the person's body language, tone and surroundings. Does the person look and sound comfortable and engaged? Are there other people around? Do they need to move to a more comfortable or private space?
- › Speak clearly and listen carefully. Allow time for the person to respond. You may need to speak more slowly, cover one point at a time, ask open questions, or take long pauses.
- › Maintain appropriate eye contact by looking at the camera when you speak and be aware of the person's response on screen.
- › Use your tone, facial expressions and body language to express attention and warmth. For example, smile, nod, and mirror the person's posture.

Finishing a call

- › Ask how the person felt about the call and if they found it helpful.
- › Discuss any follow-up activities and ask about the person's preferences for future calls. For example when will it be helpful to call again? Would they prefer to have shorter or more frequent calls?
- › After the call, document whether the call was by phone or video and if you had any communication or technical problems.

If you have concerns about a person's wellbeing, discuss this with them during the call, if appropriate, and book a time to be in contact again. After the call, discuss your concerns with your supervisor/line manager for advice on further action.

Be mindful that it may be harder to identify concerns when using phone or video calls. Discuss any uncertainties with your supervisor/line manager. Try to catch up with them regularly to discuss your feelings about using phone or video calls.

Remember to smile – it can be heard in your voice!

Be mindful of the lack of visual cues to help prevent miscommunication.

This [video](#) shows some **easy tips for video calls**.