



2015

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# Accreditation Standards and Components



CONTACT USA Accreditation Standards Manual  
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## Table of Contents

<i>Introduction</i>	2
<i>Accreditation Policy</i>	3
<b>CONTACT USA Accreditation Coordinator</b>	<b>3</b>
<b>CONTACT USA Accreditation Committee</b>	<b>3</b>
<b>CONTACT USA Accreditation Site Evaluation Teams</b>	<b>4</b>
<b>Preparing for the Accreditation Team’s Site Visit</b>	<b>4</b>
<b>Travel Expenses:</b>	<b>6</b>
<b>The Site Visit</b>	<b>7</b>
<i>Initial Meeting with the Evaluation Team Members</i>	7
<i>Exit Interview</i>	7
<b>Follow-up</b>	<b>8</b>
<i>Crisis Line Scoring for Accreditation</i>	8
<i>Reporting</i>	8
<b>Accreditation Award</b>	<b>9</b>
<i>Accreditation Standards and Components</i>	9
<b>Section 1: Governance Standards</b>	<b>9</b>
<b>Section Two: Fiscal and Business Standards</b>	<b>16</b>
<b>Section Three: Training Standards</b>	<b>18</b>
<b>Section Four: Supervision and Evaluation of Crisis Line Specialists</b>	<b>22</b>
<b>Section Five: Service Standards</b>	<b>24</b>
<b>Section Six: Community Integration Standards</b>	<b>30</b>
<b>Section Seven: Facilities and Equipment Standards</b>	<b>32</b>
<b>Section Eight: Standards for CONTACT USA Membership</b>	<b>35</b>
<i>Statement of Values</i>	37
<i>Core Competencies for Crisis Line Training</i>	38
<i>CONTACT USA Annual Accreditation Document</i>	39
<b>Minimum Operating Standards</b>	<b>39</b>
<b>Site Visit Interviews</b>	<b>41</b>
Accreditation Site Visit Schedule (sample):	42
<i>Accreditation Pre-Screening Questionnaire</i>	44

## Introduction

CONTACT USA is pleased to present this revised Accreditation Manual to all crisis line programs as we continue our program of conducting on-site accreditation visits to centers every five years.

The purpose of an on-site accreditation program and this manual is to help strengthen each center or crisis line program and to increase the already proven effectiveness of telephone crisis programs. Other benefits of on-site accreditation are:

- Stimulation of crisis line programs to strive for optimal standards of service;
- Validation of a program that is performing according to nationally recognized standards;
- Consultation tailored to the needs of an individual center;
- Credibility with funding agencies and other human service agencies;
- Access to criteria for systematic, ongoing self-evaluation; and
- Assurance that the minimum operating standards for service are met.

CONTACT USA's accreditation process has become an integral element toward strengthening each crisis line program in fulfilling its mission of responding to the needs of callers.

## Accreditation Policy

Accreditation is open to any established crisis line program that has been in operation for at least one year. Full accreditation is based on the ability of the crisis line program to conform to and follow the established accreditation process and adhere to the minimum operating standards as set forth by the CONTACT USA Accreditation Committee and approved by the CONTACT USA Board of Directors.

When a new crisis line program is ready to be fully accredited, the procedure for an on-site evaluation outlined in this manual must be followed. Established crisis line programs are required to participate in the accreditation process on a five-year cycle. Accreditation is granted for a five-year period after the program:

- Accepts the conditions of accreditation as presented in the “Application for Accreditation”;
- Accepts and signs the “CONTACT USA Statement of Values”;
- Completes the on-site visit and receives a passing score;
- Is approved for accreditation by the Accreditation Committee of CONTACT USA.

Those programs not qualifying for accreditation are given up to six months to submit documentation showing that they have corrected the deficiencies identified in the accreditation report. If the standards cannot be met, the center will no longer be eligible for 501c3 status under the CUSA umbrella. The Board may elect to grant an additional three month grace period in order to help the Center come into compliance.

## CONTACT USA Accreditation Coordinator

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CONTACT USA appoints a National Accreditation Coordinator who is responsible for the overall administration and implementation of the accreditation process. Those responsibilities include:

- Notification to programs regarding the date of their on-site visit;
- Securing of approved accreditation evaluators to conduct the visit;
- Processing of all related reports; and
- Notification to the center of the outcome of the on-site accreditation visit.
- The Accreditation Coordinator works closely with the CONTACT USA Accreditation Committee in the accreditation of each crisis line program.

## CONTACT USA Accreditation Committee

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The CONTACT USA Accreditation Committee has the following responsibilities:

- Review and revise the accreditation process and accreditation standards;
- Assist the CONTACT USA Accreditation Coordinator;
- Certify Accreditation Site Evaluators;
- Review reports of Site Evaluators’ visits to centers; and
- Approve or deny accreditation of the program.

## CONTACT USA Accreditation Site Evaluation Teams

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A CONTACT USA Accreditation Site Evaluation Team consists of two certified evaluators selected by the Accreditation Coordinator. Team members will conduct the accreditation site visits following the directions set forth in the CONTACT USA Accreditation Manual.

### Preparing for the Accreditation Team's Site Visit

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#### **One year prior to the date a program is due for accreditation, the Accreditation Coordinator will:**

- Notify the program that their accreditation will expire the following year;
- Submit copies of the following documents:
  - Application for Accreditation Site Visit (electronically submitted via our website)
  - Accreditation Pre-Screening Questionnaire
  - Statement of Values
- Set tentative dates for the site visit

#### **Six months (or more) prior to the site visit, the program will:**

- Return the "Accreditation Pre-Screening Questionnaire" and signed "Statement of Values". These can be scanned and emailed or mailed through the postal service.
- Conduct a self-evaluation using the "CONTACT USA Accreditation Site Visit Scoring Sheets" to score each accreditation component; and
- Create/revise policies, procedures, and materials to correct component deficiencies.

#### **Three months prior to the site visit, the program will:**

- Mail in the Accreditation fee (\$750 for CONTACT USA member programs, \$1,250 for non-member programs). Travel arrangements will not be made until this fee is paid. (Contact the Accreditation Coordinator for the address of our current Treasurer).
- Receive from the Accreditation Coordinator the names and CONTACT information of the Site Evaluators.
- Confirm site visit dates

The crisis line program is responsible for providing the team members with directions to the center, meals and lodging during the site visit, and reimbursement for their travel expenses. CONTACT USA is responsible for providing team members with an honorarium of \$150.00. Comprehensive review of a program's documents is at the heart of the evaluation process. It is time-consuming for the evaluators and must be completed before the site visit. For the process to have integrity, allowance for adequate time to consult by telephone or e-mail between the Site Examiners or with the program director is essential. Site Examiners may ask for additional documentation in advance of, or during the course of, the site visit.

## One month prior to the site visit, the program will:

- Provide each assigned site examiner and the Accreditation Coordinator with a complete set of the required accreditation documents. The lead evaluator will advise the program of any deficits noted. The program will then be required to correct deficits, if any, and send completed and revised documents as requested. **If documents arrive late or are incomplete, the Site Evaluators, in consultation with the Accreditation Coordinator, may postpone the site visit. Any additional expense incurred will be borne by the center.** Address each component directly and specifically. Organize the documents as indicated in the “Sample Accreditation Documentation”. Once assembled the documents will be uploaded into a “Dropbox” folder per instruction from the Accreditation Coordinator.

Once the lead site evaluator approves the completeness of the documentation, the program will:

- Prepare the “Accreditation Site Evaluation Team Schedule” by:
  - Scheduling the team to attend a board meeting or meet with board Chair and/or another officer. This is often done at dinner the night before an on-site visit.
  - Scheduling interviews with the key individuals following the “Suggested Interviews for Site Evaluation Team”
  - Recording the completed schedule on the “Accreditation Site Evaluation Team Schedule” sheet and forward to team members (please note the need for team members to have time to meet together)
  - Scheduling the exit interview with the executive director, and the others he/she wishes to invite, to hear the preliminary findings of the evaluation team
- Arrange meals and transportation in consultation with the team members;
- Provide each team member with a copy of the schedule.

## Travel Expenses:

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The Agency will be responsible for all expenses associated with their accreditation site visit, including any fees incurred for changing travel plans if the visit must be postponed or cancelled due to circumstances at the Agency. Most Examiners prefer to make their own travel arrangements but if the agency has arrangements for a special rate at any local hotels these should be used.

The following is a sample of <i>estimated</i> costs for an accreditation site visit. These costs can vary widely depending on center location, as well as what kind of meals are provided and how many staff and volunteers are invited to attend. CUSA site examiners do not require or expect extravagant meals or lodging.			
Application Fee		750.00	
CUSA Membership Dues		500.00	
Lodging	\$100/person per night plus taxes	400.00	
Food, hospitality	\$60/person/day x 1 full day plus 2 travel days	240.00	Centers provide meals on day of site visit and pay per diem for travel days. Executive Director and Board President often have dinner with examiners on day one.
Transportation to/from airport or rental car		100.00	Having someone from the Center pick examiners up at airport will lessen this cost. Examiners can use free airport shuttles when available. <i>If examiners need to rent a car, the agency will be responsible for that cost.</i>
Airfare	2 people	100.00	Approximate - this can vary widely depending on location of Center. CUSA examiners will always book the least expensive airfare available.
	Total <i>estimated</i> costs:	2,990.00	



## The Site Visit

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The site visit requires a minimum of eight hours on site. Travel arrangements for team members will determine the schedule and may necessitate an additional half-day at the center or crisis line program. The following components must be incorporated into the site visit schedule:

- A meeting with the Executive Director and/or program director early in the visit;
- A tour of the facility;
- Scheduled interviews as outlined in the “Suggested Interviews” document; and
- An exit interview.

Because evaluators have differing styles and approaches to the task of evaluating a program, the structure of the visit must be negotiated between program leaders and team members.

Some of the possible variables are:

- Individual versus group interviews;
- Both evaluators working together on all interviews versus each evaluator doing separate interviews; and
- Many short interviews versus fewer in-depth interviews.

Additionally, teams will want to speak directly to community leaders and funders whenever possible. In the event that these meetings cannot be arranged, teams may rely on documentary evidence of external relationships.

It is very important for the team and the program leaders to communicate their needs and constraints before the scheduled date of the site visit.

## Initial Meeting with the Evaluation Team Members

At the initial meeting with the team members, the Agency Director should be prepared to:

- Review the completed “Accreditation Site Evaluation Team Schedule” and make necessary adjustments;
- Have available the current month’s telephone workers schedule, a list of current active volunteers, and board minutes for the past year; and
- Make available any other material requested by the evaluation team.

### Score Sheet Completion

During the site visit, the evaluators will review documentation and conduct interviews to determine a score for each accreditation component. These scores will determine the team’s recommendation regarding the accreditation of the program.

## Exit Interview

The exit interview will include:

- Overall impressions of the site visit, including strengths of the center noted;
- A review of each section of the accreditation standards;
- Preliminary recommendations for improvements needed.

## Follow-up

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Following the site visit, the director of the crisis line program completes the “Accreditation Site Visit Evaluation Form” (page 47) and returns it to the CONTACT USA Accreditation Coordinator. The Accreditation Coordinator shares general content of the form with the accreditation evaluators who conducted the crisis line program’s site visit. In the event that the Accreditation Coordinator is one of the site evaluators, the evaluation form will be sent to the Executive Director or Board President.

## Crisis Line Scoring for Accreditation

The “CONTACT USA Accreditation Site Visit Scoring Sheets” are used to score each of the accreditation components during the site visit to the crisis line program. The scoring sheets are included with the accreditation site evaluation report prepared by the evaluators.

Each accreditation component has four levels of compliance, which are cumulative and progressive. Levels are scored as follows:

Level 0 = No compliance	0 points
Level 1 = Minimal compliance	1 point
Level 2 = Adequate compliance	2 points
Level 3 = Exceptional compliance	3 points

Maximum and minimum scores for each section are shown on the scoring sheets. The Site Evaluators are required to make recommendations for improvement for any component scored level 0 or level 1.

Requirements for accreditation of the crisis line program include:

- Minimal compliance for all standards except as indicated;
- For the standards’ components marked with two asterisks (\*\*) and shaded on the scoring sheets, specific levels are required. These components are considered essential to the operation of a crisis line program and are included in the CONTACT USA Minimum Operating Standards;
- **All** sectional scores at the minimum score level or above.

Deficiencies must be corrected within six months for the crisis line program to be awarded accreditation. It is possible for a crisis line program to score above the minimum levels required and still not be granted accreditation if other problems are discovered during the site visit.

## Reporting

Within two weeks following the site visit, the lead evaluator, in collaboration with the other team member, submits an accreditation report, including signed scoring sheets, to the CONTACT USA Accreditation Coordinator. Any travel reimbursement documents must be submitted to the Treasurer at this time as well so that the agency can be billed. The Accreditation Coordinator forwards the report to the CONTACT USA Accreditation Committee for their review and an accreditation decision. Upon receipt of payment from the agency, the CONTACT USA Accreditation

Coordinator notifies the crisis program director and the crisis line program's board chair of the decision.

## Accreditation Award

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When accreditation is awarded, the Accreditation Coordinator sends a "Certificate of Accreditation" and a copy of the accreditation site report, including the completed and signed scoring sheets, to the crisis line program.

The accreditation award is made on a five-year rotation. During that time, the crisis line program must submit an annual report to CONTACT USA using the "Annual Document" form. The program director also must notify the CONTACT USA Accreditation Coordinator of any change that could affect the program's accredited status. During the fourth year after the awarding of the previous accreditation the Accreditation Coordinator will initiate the process for reaccreditation.

### Non-Accreditation:

In the event the crisis line program fails to meet the requirements for accreditation, the program director has six months to submit evidence to the CONTACT USA Accreditation Coordinator, showing that the deficiencies have been corrected. Failure to correct the deficiencies results in non-accreditation. The program may reapply for accreditation the following year.

### Lapsed Accreditation

When a member agency is not able to renew their accreditation in the year it is due, they must pay the accreditation fee and schedule a site visit by March 30 of the following year. That visit must take place before the end of that calendar year. If the center is a member of the National Suicide Prevention Lifeline network, notification will be given that they are not currently accredited by CONTACT USA.

## Accreditation Standards and Components

### Section 1: Governance Standards

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#### Purpose, Planning and Evaluation

**Rationale:** An organization that serves the public and seeks the support of the community needs a clear and concise statement of its purpose, values, and philosophy. It also engages in strategic and long-range planning consistent with its purpose, values, and philosophy and based on regular program evaluation determines whether the service provided is appropriate, worthwhile, and effective. The planning process offers a means by which programs can be examined, monitored, changed, continued, expanded, or discontinued.

**Standard:** The center has formally adopted a mission statement that clearly states its purposes which are consistent with the values and philosophy of CONTACT USA. The mission statement is used as a key element in the center's program planning process to develop and promote the services of the center. The center uses best practice measurements, including objective

measurements, to meet its program goals and objectives. The results of its evaluations are used to improve delivery of services.

**Components:** The components of this standard are a mission statement with membership support, strategic/long-range planning, and program evaluation, including implementation of evaluation results.

**Questions:**

- Has the center's Board of Directors developed and adopted a mission statement clearly setting forth the purpose, values, and philosophy of the organization?
- Do staff and volunteers understand what the program is intended to do?
- Does the center engage in strategic/long range planning, consistent with its mission statement?
- Does the center evaluate its services on a regular basis using objective methods and make needed changes based on those results?

**Component 101: Mission Statement**

- Level 0:       \*\*The center has not adopted a mission statement.
- Level 1:       \*\*The center has a mission statement.
- Level 2:       The center has adopted a mission statement consistent with the purposes of CONTACT USA.
- Level 3:       The center has a mission statement consistent with the purposes of CONTACT USA. It is reviewed and revised periodically.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

**Component 102: Organizational/Program Planning**

- Level 0:       No organizational/program planning is done.
- Level 1:       Some organizational/program planning is done on an inconsistent basis and with little regard for the implications of the center's mission statement.
- Level 2:       An annual plan is adopted, consistent with the implications of the center's mission statement, to develop, promote, and evaluate its programs.
- Level 3:       A strategic (long-range) plan is in place, is reviewed annually, and is consistent with the implications of the center's mission statement, to develop, promote, and evaluate its crisis line program.

**Component 103: Program Evaluation and Results Implementation**

- Level 0:       No evaluation of the center's program is conducted.
- Level 1:       Evaluation of the center's program is not conducted on a consistent basis.
- Level 2:       Evaluation of the center's program is conducted on a regular basis and reported to the center's Board of Directors.
- Level 3:       Evaluation of the center's program is conducted on a regular basis and reported to the center's Board of Directors. This results in implementation of new policies and procedures as needed.

## Legal Structure

**Rationale:** Any purposeful organization requires legal and ethical structure for its vitality. Incorporation provides a corporate legal status to the organization and helps to protect the interests of individuals who are associated with the organization. Such status gives the organization and its supporters certain tax advantages and assures the public that the funds of the organization are used for designated purposes. Most funding sources require that an organization have tax-exempt status and be registered as a charitable organization.

**Standards:** The center is incorporated as a not-for-profit corporation and operates in compliance with applicable laws. The center may be part of a larger multi-service corporation or faith community that has its own governing body. The governing body is incorporated exclusively for charitable or religious purposes. The center participates in an Internal Revenue Service Group Exemption or has an independent IRS determination letter. If applicable, the center also secures state and/or local tax exemption and registers as a charitable organization.

**Components:** The components of these standards include nonprofit incorporation, IRS tax-exempt status and, if applicable, state tax-exempt status and registration as a charitable or religious organization; and compliance with all federal, state, and local reporting requirements.

### Questions:

- Is the organization incorporated as a not-for-profit corporation?
- Has the IRS ruled that the center is exempt from federal income taxes and if applicable, exempt from state taxes?
- Is the center in full compliance with all the requirements of this exemption, and if applicable, registered as a charitable or religious organization within its state's jurisdiction?

### Component 104: Not-for-Profit Incorporation

Level 0:	The organization is not incorporated.
Level 1:	The organization has applied for nonprofit incorporation but has not yet received it.
Level 2:	The organization is incorporated as a not-for-profit corporation. However, it has not fulfilled all of the reporting requirements.
Level 3:	All of the reporting regulations of state corporate law are being met.

### Component 105: Federal Nonprofit (IRS) Determination and Compliance

Level 0:	The center is not exempt from federal income taxes or is not in compliance with federal requirements.
Level 1:	N/A
Level 2:	N/A
Level 3:	The center is exempt from federal taxes, reviews its tax exemptions annually, and files IRS Form 990, if required. The center is in compliance with federal requirements.

## Component 106: State Nonprofit/Charitable Determination

- Level 0: The center is not currently registered as a nonprofit, charitable, or religious organization.
- Level 1: The center is registered as a charitable or religious organization. However, it is only in partial compliance with related requirements
- Level 2: The center is registered as a charitable or religious organization and is exempt from state taxes, as applicable.
- Level 3: The center is registered as a charitable or religious organization, renews its status annually, and fulfills all related requirements.

## Code of Ethics

**Rationale:** In order to protect human rights, to promote the public interest and to guide individual behavior, it is necessary to adopt and enforce codes of ethical practice appropriate to the organization's purposes.

**Standard:** The center has adopted and is using a code of ethics for its purposes and includes sections on confidentiality, the rights of callers, suicide prevention, non-discrimination, and conflicts of interest.

**Component:** The component of this standard is the adoption of a code of ethics.

### Question

- Does the center have a code of ethics which it uses to set standards for its behavior?

## Component 107: Code of Ethics

- Level 0: \*\*The center has not adopted a formal, written code of ethics.
- Level 1: \*\*The center has adopted a formal code of ethics for its use.
- Level 2: The center has developed and adopted a formal, written code of ethics that includes sections on confidentiality, the rights of callers, suicide prevention, non-discrimination, and conflicts of interest.
- Level 3: The center's Board of Directors reviews the code periodically. All board members and staff (paid and volunteer) are given a copy of the code. Staff evaluations include the awareness of ethical issues.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

## Administrative Structure

**Rationale:** Any purposeful organization requires a governing and administrative structure that ensures that its vitality and integrity are maintained, its mission is accomplished, and the interests of persons associated with the organization are protected.

**Standards:** The center’s board functions within a prescribed set of bylaws. The organization also has formal policies and procedures that guide and hold accountable the actions of officers, committees, staff, and all other persons associated with the center.

The center has a recognized Board of Directors, including elected officers who are responsible for the organization's integrity, vitality, and mission. This body has final authority within the structure, and serves as the legal and corporate entity, holding in trust the purposes of the organization.

**Components:** The components of the required organizational structure include bylaws, a governing Board of Directors with elected officers and detailed responsibilities and policies and procedures for the administration of the organization’s operations.

**Questions:**

- Do the bylaws provide adequate regulations for the internal affairs of the organization?
- Does the organization have an active Board of Directors that is collectively responsible for the governance of the center?
- Are the roles, responsibilities, and requirements of the Board of Directors clearly understood and followed?
- Does the center have an “Administrative Policies and Procedures Manual” or equivalent?

**Component 108: Bylaws**

- Level 0:           \*\*There are no formal, written bylaws for the center.
  - Level 1:           \*\*There are formal, written bylaws defining the authority and responsibilities of the Board of Directors, including its officers, the Executive Director or program equivalent, volunteers, and membership (if any).
  - Level 2:           The bylaws are formally reviewed by the Board at least every three years and are amended as needed.
  - Level 3:           Bylaws are formally reviewed by the Board annually. The bylaws and current practices are made consistent.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

**Component 109: Board of Directors or Governing Body**

- Level 0:           \*\*There is no Board of Directors or governing body.
  - Level 1:           \*\*There is a Board of Directors or governing body with appropriate officers, created for the purpose of advising, directing and governing the center.
  - Level 2:           The election or appointment of Board members or governing body is conducted in accordance with the organization’s bylaws. The board demonstrates involvement in the setting of policy and oversight of the center and meets at least four times each year.
  - Level 3:           The governing body demonstrates active involvement in the setting of policy and oversight of the center through active committees as determined by the governing body. The board meets at least eight times each year.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### **Component 110: Board of Directors' Membership and Participation**

- Level 0: New members are not provided orientation to their roles and responsibilities, or to the mission and purposes of the center.
- Level 1: There is an informal orientation of the members. The Board's activities and participation do not reflect its duties as defined by the bylaws.
- Level 2: There is adequate orientation for new members. Members attend most meetings, participate in fundraising, and at least fifty percent of the Board members make an annual financial contribution. As vacancies occur, new members are actively sought to reflect the demographic composition of the community.
- Level 3: Members attend at least seventy-five percent of meetings and take a major role in the fund raising efforts of the center. All members make a financial contribution to the center annually. The members conduct an assessment of the group's skills, practices and implementation. The composition of the Board reflects the demographic composition of the community.

### **Component 111: Board of Directors' Policies and Structure**

- Level 0: The Board has no written policies or Board manual.
- Level 1: There is a Board manual or equivalent, but it has not been updated since the most recent accreditation. There is a Board committee structure, but most committees are not active.
- Level 2: The Board manual and center bylaws reflect the mission and purposes of the center. There are active committees and they function as directed by the bylaws. There is a Board-approved Conflict of Interest policy.
- Level 3: The members conduct an assessment of the committee structure and update it to reflect the mission of the center.

### **Component 112: Administrative Operations Policies and Procedures**

- Level 0: The center does not have any policies and procedures for administrative operations.
- Level 1: The center has formal, written policies and procedures governing its administration. These delineate duties, responsibilities, and lines of authority for the Board and the paid and volunteer staff.
- Level 2: Formal policies and procedures are followed consistently. There is an informal annual report.
- Level 3: The policies and procedures are reviewed annually and revised as needed. A formal annual report of organizational activities and an accounting of revenue and expenditures is distributed.

## **Human Resources**

**Rationale:** In keeping with its purpose and in accordance with its program needs, a responsible organization requires personnel who are responsible for accomplishing the work of the organization. All executive and administrative staff positions need to be clearly defined as to their duties, authority, and responsibilities.



**Standard:** The governing body has provided for sufficient staff to accomplish the work of the organization. The duties, authority, and responsibilities of each position are clearly defined.

**Components:** The components of this requirement are: position descriptions, personnel policies and procedures, and a qualified Executive Director or program director who subscribes to the program’s mission, values, and purposes.. Provision is made to add or develop staff as needed.

**Questions:**

- Are there job descriptions that clearly delineate the duties, authority, and responsibilities of each employee and volunteer position? Are paid and volunteer staff provided with written personnel policies?
- Does the center have a qualified Executive Director or program director who understands and supports the mission statement and relates effectively with the Board, staff, and relevant community entities?
- Does the Executive Director or program director meet educational/experiential requirements necessary to direct the program?
- Has provision been made for adequate staffing?

**Component 113: Personnel Accountability**

- Level 0: The center does not have written staff position descriptions or personnel policies and procedures.
- Level 1: \*\*The center has written staff position descriptions and personnel policies and procedures, but they have not been updated to reflect current practices.
- Level 2: The center has written staff position descriptions and written personnel policies and procedures that are reviewed and revised to reflect current practices. Informal personnel evaluations take place.
- Level 3: Annual personnel evaluations for all program staff members are conducted, using clearly defined performance requirements related to the specific position description.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

**Component 114: Executive Director or Program Director**

- Level 0: There is no Executive Director or program director or person designated to fulfill the duties and responsibilities of that position.
- Level 1: \*\*There is an Executive Director or program director who implements policy and is responsible for day-to-day management of the program.
- Level 2: There is an Executive Director or program director who manages the program competently and relates adequately with the governing board and paid and volunteer staff.
- Level 3: Director relates well with the governing board, paid and volunteer staff, and other relevant agencies and funders as evidenced by letters of support and/or interviews.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 115: Program Director's Education/Experience Requirements

- Level 0: The program director does not have a college degree and has less than one year of professional or volunteer human service management experience.
- Level 1: The program director has a bachelor's degree or one to five years of professional or volunteer human service management experience.
- Level 2: The program director has a master's degree or more than five years of professional or volunteer human service management experience.
- Level 3: The program director has a bachelor's or master's degree plus five or more years of professional or volunteer human service management experience.

### Component 116: Support Staff

- Level 0: The program does not have paid administrative staff.
- Level 1: The program has some administrative staff but is struggling to meet existing program needs.
- Level 2: The program is able to meet most of the existing program and administrative needs.
- Level 3: The program has sufficient support staff to meet all existing program and administrative needs.

## Section Two: Fiscal and Business Standards

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**Rationale:** Adequate financial and insurance resources are necessary for an organization to accomplish its mission and to enjoy the support and respect of the community it serves.

**Standards:** The center has sufficient revenue from diverse sources. Its funds are raised, managed, disbursed, and reported in accordance with acceptable nonprofit business practices. These include a budget, an annual audit of all finances, and adequate insurance coverage. Adequate insurance coverage includes **some** of the following: comprehensive liability, professional liability, directors' and officers' liability, real and personal property, bonding for persons with financial responsibilities, and worker's compensation.)

**Components:** The components of this standard are adequate financial resources and acceptable business practices. These include a budget, an annual audit of all fiscal records, and adequate insurance coverage.

#### Questions:

- Does the center have diverse and adequate sources of revenue for its program?
- Are acceptable business practices used in raising, disbursing, and accounting for funds?
- Does the budget realistically predict levels of revenue and expenditures?
- Is an annual external audit conducted?
- Does the center have adequate insurance coverage?

### **Component 201: Short Term Funding for the Program**

- Level 0: There is no renewable and consistent formal financial base for the program.
- Level 1: The center's budgeted revenue is not adequate for its current program.
- Level 2: The center's revenue is adequate for current needs and is broad-based with three or more major sources of funding.
- Level 3: The center's revenue is more than adequate for current program needs. There is a three-month operating reserve. The center's program has broad-based funding with no more than thirty percent of its revenue from one source or has at least six months of operating reserves

### **Component 202: Long Term Fund Development Planning**

- Level 0: There is no fund development planning.
- Level 1: There is fund development planning, but the center is dependent on one or two sources of income to meet ninety percent of its current revenue needs.
- Level 2: The center's fund development plan is broad-based.
- Level 3: The center has a formal, written fund development plan that is being implemented. It addresses existing program growth and emerging community needs. The plan includes future funding development strategies.

### **Component 203: Business Practices**

- Level 0: \*\*The center has no formalized business procedures or records.
- Level 1: \*\*The center has some informal practices regarding financial accountability.
- Level 2: The center's business operations are based on formal, written policies and procedures regarding financial accountability.
- Level 3: The governing body regularly reviews comprehensive financial reports for effective, judicious oversight.

**\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

### **Component 204: Budgets**

- Level 0: The center does not have an operating budget for the current year.
- Level 1: \*\*The center has a board-approved operating budget for the current year.
- Level 2: The center has a board-approved operating budget based on previous financial reports. It compares budget projections with actual revenue and expenditures.
- Level 3: The operating budget also anticipates the agency's needs and resources to fulfill its program goals.

**\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

### **Component 205: Audits**

- Level 0: \*\*The center's financial records are not audited or reviewed.
- Level 1: \*\*The center's financial records are audited or reviewed internally.
- Level 2: An independent public accountant performs an annual audit of the center's financial records at the close of each fiscal year.
- Level 3: The center's audits for the past three years have received unqualified opinions.

**\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

## Component 206: Insurance

- Level 0: The center has no insurance to protect the agency, its assets, or personnel.
- Level 1: The center has minimal personal and property insurance to protect the agency, its assets, and personnel.
- Level 2: The center has adequate insurance to protect the agency, its assets, and personnel.
- Level 3: The center has adequate insurance coverage to protect the agency, its assets, and personnel, and the center's portfolio is reviewed annually to ensure continued adequate insurance coverage

## Section Three: Training Standards

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### Basic Training Program

**Rationale:** Those who volunteer or are employed to provide a particular service have a right to expect that they will be given an adequate opportunity to acquire the requisite attitudes,

knowledge, and skills and to integrate these into safe and competent practice. Callers have the right to expect to be heard compassionately, non-judgmentally, and confidentially, and to be assisted appropriately.

**Standard:** The center's basic training program for persons who care for others by telephone is a minimum of 16 hours of face-to-face instruction, role-play and 8 hours of apprenticeship, for a total of *at least* 32 hours. There is a commissioning ceremony or graduation, not included in these hours.

Training is required on the following:

- History of the Center, Orientation, and Self-Awareness
- Listening and Communication Skills
- Code of Ethics
- Program Policies and Procedures
- Grief, Loss, and Loneliness
- Crisis Intervention, Suicide
- Depression and Other Serious Mental Illnesses
- Frequent Callers and Abusive Callers
- Setting Appropriate Limits
- Addiction, Substance Abuse, and Related Issues
- Domestic Violence
- Child and Elder Abuse and Neglect
- Accessing Community Resources

Centers may add to these areas, according to their needs.

**Demonstrable Competencies:** The training program focuses on demonstrable attitudes, knowledge and skills, and:

- presents a basic understanding of human personality with its physical, psychological, spiritual, and social needs and attendant problems;
- gives knowledge of how to help and care for people in times of stress;

- ensures that prospective Crisis Line Specialists develop their abilities to help callers, understand the limits of their role, and learn how to make referrals;
- ensures that Crisis Line Specialists understand and integrate into safe, competent practice the special techniques of telephone crisis line work;
- includes a period of supervised apprenticeship in the telephone room;
- includes a process through which a trainee's competence to serve on the telephone is adequately evaluated; and
- makes service on the crisis line dependent upon completion of classroom and apprenticeship requirements and the signing of a pledge to maintain confidentiality.

**Components:** The components of this standard are: a minimum of a 32-hour training program, specific training requirements that encompass the core competencies, the integration of psychological insights, demonstrable results, the use of appropriate publications and resources, and commissioning of approved trainees.

**Questions:**

- Does the basic training program include the required hours of face-to-face training and apprenticeship for Crisis Line Specialists?
- Is the training focused on producing the knowledge, attitudes, and skills required for use in the telephone room?
- Does the training program incorporate the core competencies?
- Are the trainees commissioned (graduated, certified) in a formal ceremony?

**Component 301: Thirty-Two Hour Basic Training Program**

- Level 1: The basic training program consists of a minimum of 32 hours, to include: at least 16 hours of face-to-face instruction, role-play, and at least 8 hours of supervised apprenticeship.
- Level 2: The basic training program features varied teaching modalities such as lecture, group exercise, video, etc.
- Level 3: Training program is designed and modified based on written evaluations from trainees.

**\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

**Component 302: Specific Training Requirements on Core Competencies**

- Level 0: The training does not meet the requirements on core competencies.
- Level 1: **\*\*The center's basic training program is designed to encompass the core competencies and to provide instruction in the special techniques of non-judgmental, active listening; crisis intervention; and information and referral. Topics may be covered through readings, videos or lecture.**
- Level 2: The center's basic training program is modified and updated based on assessments by staff and volunteers.
- Level 3: The center's basic training program reflects the specific needs of the crisis line program's community demographics. All topics are covered thoroughly via face to face training and discussion.

**\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

### Component 303: Demonstrable Competencies of Crisis Line Specialists

- Level 0: There are no written objectives for training.
- Level 1: The written objectives are not measurable.
- Level 2: The basic training program focuses on enabling the trainees to demonstrate the knowledge, attitudes, and skills essential to provide crisis line services. Written objectives are measurable and trainees take an exam at the end of training.
- Level 3: The Crisis Line Specialists have integrated the necessary knowledge, attitudes, and skills into safe, competent practice. Some specialists are CUSA Certified Hotline Workers.

### Component 304: Commissioning, Certification, or Graduation Ceremony

- Level 0: There is no acknowledgment of trainees upon completion of at least the classroom portion of training.
- Level 1: There is informal acknowledgment (such as a newsletter or telephone room announcement) of trainees upon completion of at least the classroom portion of training.
- Level 2: There is official acknowledgment (such as receipt of a certificate, diploma, pin, or other token) of trainees upon completion of at least the classroom portion of training.
- Level 3: There is a formal certification, commissioning, or graduation ceremony for trainees upon completion of at least the classroom portion of training.

### Qualification of Trainers

**Rationale:** The effectiveness of a training program can be enhanced or hindered by all who participate in the training process.

**Standard:** Planners, trainers, presenters, and facilitators have knowledge and skills appropriate for their roles.

**Components:** The components of this standard are: the qualifications of the center's training committee, the individual trainers (presenters), and role-play facilitators.

#### Questions:

- Are the members of the program's training committee qualified for their responsibilities?
- Are the presenters qualified for their responsibilities?
- Are the facilitators qualified for their responsibilities?

### Component 305: Training Committee's Experience, Knowledge, and Skills

- Level 1: Members of the program's training committee have limited experience, knowledge, and skills in the area of crisis line work.
- Level 2: All members of the program's training committee have the needed experience, knowledge, and skills.

Level 3: Members' competence is indicated by overall positive written evaluations of the training program by the three most recent classes of newly commissioned Crisis Line Specialists.

### **Component 306: Presenter Experience, Knowledge, and Skills**

- Level 0: Presenters lack needed experience, knowledge, and skills.
- Level 1: Some presenters have the needed experience, knowledge, and skills.
- Level 2: All presenters have the needed experience, knowledge, and skills specific to crisis line work.
- Level 3: Presenters competence is indicated by overall positive written evaluations of the training program by the three most recent classes of newly commissioned Crisis Line Specialists.

### **Component 307: Role Play Facilitators' Experience, Knowledge, and Skills**

- Level 0: Role-play facilitators lack the needed experience, knowledge, and skills.
- Level 1: Some facilitators have the needed experience, knowledge, and skills.
- Level 2: All role-play facilitators have the needed experience, knowledge, and skills.
- Level 3: Role-play facilitators competence is indicated by overall positive written evaluations of the training program by the three most recent classes of newly commissioned Crisis Line Specialists.

## **Continuing Education**

**Rationale:** Providing opportunities and setting minimum requirements for Crisis Line Specialists to participate in a program of continuing education will encourage the further development of skills and the updating of knowledge.

**Standard:** The center or crisis line program has established a continuing education program for Crisis Line Specialists to help them maintain their skills. All active Crisis Line Specialists participate in at least four continuing education activities annually. Relevant continuing education may include meetings, media presentations, readings, or classes.

**Components:** The components of this standard are the provision of a program of continuing education and participation of all active Crisis Line Specialists in the continuing education program.

### **Questions:**

- Does the center or crisis line program have a program of continuing education for Crisis Line Specialists?
- Do all Crisis Line Specialists participate in at least four continuing education activities annually and is this documented?

### Component 308: Continuing Education Program

- Level 0: There is no continuing education program offered.  
Level 1: \*\*The center infrequently offers relevant continuing education.  
Level 2: The center regularly offers continuing education.  
Level 3: The center offers a variety of continuing education opportunities and encourages Crisis Line Specialists to participate in other continuing education opportunities available in the community.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 309: Crisis Line Specialist Participation in Continuing Education Activities

- Level 0: Phone Specialists are not required to participate in continuing education activities.  
Level 1: \*\* Agency has a formal continuing education program requiring participation in at least one qualifying activity annually. There is evidence that all specialists have met this requirement.  
Level 2: The agency requires all phone workers to attend at least one face-to-face continuing education activity annually.  
Level 3: The agency requires phone workers to participate in four or more continuing education activities per year.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

## Section Four: Supervision and Evaluation of Crisis Line Specialists

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Components 401-402 apply to all programs.

Components 403-405 apply only to programs that use volunteer Crisis Line Specialists.

**Rationale:** Callers have the right to expect help that integrates sound theory into safe practice; this requires Crisis Line Specialists who are well trained, supervised, and evaluated.

**Standard:** Crisis Line Specialists are trained, supervised, and their performance is evaluated at least annually. The program is able to recruit and retain the number of volunteers needed to provide the kind and quality of services for which it has sought accreditation. CONTACT USA experience indicates that for a volunteer-based 24/7 program, the program ideally needs a minimum of ninety volunteers. (It is not a requirement of CONTACT USA that programs are open 24/7, only that they have coverage during advertised hours).

**Components:** The components of this section are the recruitment, supervision and evaluation of the program's Crisis Line Specialists.

#### Questions:

- Does the crisis line program provide adequate supervision for its Crisis Line Specialists?
- Does crisis line program provide adequate evaluation of its Crisis Line Specialists? Is the crisis line program able to recruit a sufficient number of trainees to replace those who are no longer active?
- Does the program have volunteer recognition programs?
- Are records on volunteers' statistics updated and current?



### **Component 401: Supervision of Crisis Line Specialists**

- Level 0: The Crisis Line Specialists are not supervised.
- Level 1: The crisis line program has informal supervision.
- Level 2: There is a structured program of supervision with at least one paid or volunteer staff person whose responsibility is the supervision of Crisis Line Specialists.
- Level 3: Phone workers are required to meet with a supervisor regularly to discuss their experiences on the phones.

### **Component 402: Evaluation of Crisis Line Specialists**

- Level 0: The Crisis Line Specialists' work performance and telephone skills are not evaluated.
- Level 1: The crisis line program has an informal evaluation that includes feedback by phone, in writing, by email, or in person.
- Level 2: The crisis line program has developed and uses a system of evaluation of each Crisis Line Specialist's work performance and phone skills.
- Level 3: The crisis line program's evaluation program includes face-to-face meeting(s) with phone workers. This includes a plan for addressing deficiencies.

### **Component 403: Recruitment of Crisis Line Specialists**

- Level 0: The crisis line program does not have a volunteer recruitment program.
- Level 1: The crisis line program's recruitment program produces an insufficient number of volunteers to meet its advertised hours of operation.
- Level 2: The crisis line program's recruitment program produces an insufficient number of volunteers and relies on the services of another accredited crisis line program to meet its advertised hours of operation.
- Level 3: The crisis line program's recruitment program provides a sufficient number of volunteers to meet its advertised hours of operation.

### **Component 404: Recognition of Crisis Line Specialists**

- Level 0: There is no program for recognition.
- Level 1: There is an informal program for recognition.
- Level 2: There is an annual, formal program for recognition.
- Level 3: There are ongoing opportunities for recognition and participation in CONTACT USA national recognition programs i.e. Gold, Silver Bronze, or the Spirit of CONTACT Award. (Agencies which are new to CUSA will be exempt from this requirement and will achieve a level three score assuming the requirements of levels one and two are also met).

## Component 405: Recordkeeping of Crisis Line Specialists Statistics

- Level 0: No records of hours are maintained.
- Level 1: Records are maintained, but are not updated regularly.
- Level 2: Records are maintained at least annually.
- Level 3: Records are updated at least monthly.

## Section Five: Service Standards

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### Crisis Line Services

**Rationale:** The public has a right to expect that the crisis line service is available as advertised and that the response a caller receives is in keeping with the stated purposes of the organization and in accord with acceptable standards of community service. Crisis line programs must have specific guidelines regarding active crisis and suicide intervention.

**Standard:** Callers have direct access by telephone to Crisis Line Specialists during advertised hours. The crisis line is provided without regard to the age, gender, race, religion, sexual orientation, or national origin of the caller. Centers have specific written policies and procedures regarding active intervention during crisis and suicide calls. Crisis Line Specialists have access to these written documents.

**Components:** The components of this standard are a non-exclusionary policy for callers, crisis line availability, adequacy of response, call forwarding capability, and crisis intervention.

#### Questions:

- Does the center have a non-exclusionary policy for callers?
- Do callers have access by telephone to a Crisis Line Specialist during advertised hours?
- Do Crisis Line Specialists understand and follow the program's policies regarding intervention on crisis and suicide calls?

## Component 501: Non-Exclusionary Caller Policy

- Level 0: The center does not meet the minimum requirements for this standard.
- Level 1: \*\*The center has a non-exclusionary caller policy, and accepts calls without regard to the age, gender, race, religion, sexual orientation, or national origin of the callers.
- Level 2: The center provides training to Crisis Line Specialists on understanding and respecting the cultural differences of callers.
- Level 3: The center is proactive in advertising its non-exclusionary caller policy.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 502: Crisis Line Availability

- Level 0: There is not a phone specialist available during all advertised hours.
  - Level 1: \*\*A Crisis Line Specialist is always available during advertised hours, but fewer than 12 hours a day and/or fewer than 7 days a week.
  - Level 2: A Crisis Line Specialist is always available more than 12 hours a day, 7 days a week, but fewer than 24 hours every day.
  - Level 3: A Crisis Line Specialist is always available 24 hours a day, 7 days a week.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 503: Call Forwarding Use and Policy within the Program

- Level 0: The center does not meet the minimum requirements for this standard.
  - Level 1: \*\*Any Crisis Line Specialist receiving forwarded calls must have access to a second phone line, but the program does not have other formal policies or procedures for call forwarding.
  - Level 2: Calls are forwarded to a trained Crisis Line Specialist who has access to a second phone line, and does not have, or can switch off, services such as call waiting or an answering machine that might confuse callers. The program has adequate written call forwarding policies.
  - Level 3: **The program does not use call forwarding** or calls are forwarded to a trained Crisis Line Specialist who has access to a second phone line and resources, such as Information & Referral files, similar to those in the telephone room. The program has adequate written call forwarding policies. There is a formal process for monitoring the quality of services provided through call forwarding.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 504: Call Forwarding to Another Crisis Line Program

- Level 0: The agency forwards to a program which is not accredited.
  - Level 1: \*\*The program accepting forwarded calls is accredited and meets the advertised hours of the forwarding program.
  - Level 2: The program accepting the calls has an adequate database of referrals in the forwarding program's area.
  - Level 3: There is a formal memorandum of understanding between the programs that includes a written protocol for handling calls with at least annual assessment of the adequacy of the response, or **the program does not use call forwarding.**
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 505: Call Capacity During Advertised Hours

- Level 0: There is only one phone available in the call center.
  - Level 1: \*\*There is at least one incoming crisis line and a second phone available for emergencies.
  - Level 2: There are adequate crisis lines to handle incoming call volume, and at least one additional phone available for emergencies. No individual paid or volunteer phone worker covers the phones more than 40 hours per week except in the event of unforeseen disaster.
  - Level 3: The agency has a plan to increase coverage in the event of a sudden influx of calls.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 506: Suicide Lethality/ Risk Assessment Form

- Level 0: The center has no lethality risk assessment form.
- Level 1: \*\*The center has a suicide lethality risk assessment form, and it is used consistently by Crisis Line Specialists.
- Level 2: Completed suicide lethality risk assessment forms are reviewed regularly by the center's designated parties (e.g. Call Management Committee, Executive Director, Support Workers) and feedback is given to Crisis Line Specialists.
- Level 3: The center's suicide lethality risk assessment form is based on nationally recognized, evidence-based best practices as recommended by the National Suicide Prevention Lifeline, SAMHSA, SPRC or similar.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 507: Policies on Intervention on Suicide Calls

- Level 0: The center has no written policies regarding intervention on suicide calls.
- Level 1: \*\*The program has written policies and directives regarding intervention on suicide calls but not all Crisis Line Specialists have been trained on them.
- Level 2: The program has written policies and written directives for intervention on suicide calls. The Crisis Line Specialists are trained on those policies during initial training. The policies are followed consistently.
- Level 3: The policies are reviewed annually and updated as needed. Continuing education is offered annually on the intervention policies.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

### Component 508: Response to Other Emergency Calls (abuse, homicide, safety concerns)

- Level 0: There are no specific procedures for responding to various kinds of emergency situations.
- Level 1: Emergency call handling procedures are not specific or comprehensive.
- Level 2: Emergency call handling procedures are taught in the initial training program and are clearly spelled out in the Policies and Procedures Manual.
- Level 3: The procedures are reviewed and revised as needed.

## Support Services

**Rationale:** Crisis Line Specialists on duty need access to support and assistance, especially in cases of emergency.

**Standard:** The crisis line program's response to human need includes the provision of immediate support and assistance to Crisis Line Specialists on duty. Support workers and/or staff have been specifically trained to provide support and to assist the worker on duty in cases of emergency.

**Components:** The component of this standard is a support system for Crisis Line Specialists.

**Questions:**

- Does the crisis line program have an adequate support system for the Crisis Line Specialists on duty?
- Are support workers provided training for their responsibilities?

**Component 509: Support System**

- Level 0: There is no support system in place for Crisis Line Specialists.  
Level 1: \*\*There is an informal support system for Crisis Line Specialists.  
Level 2: There is a formal support system, but support workers are not specifically scheduled.  
Level 3: Support workers are always scheduled and available to Crisis Line Specialists on duty.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

**Component 510: Support Worker Training**

- Level 0: No training is provided for support workers.  
Level 1: Some training is provided to support workers.  
Level 2: Training is provided to support workers, who are formally evaluated for competency. Support workers meet at least annually to update needed information, share experiences and to strengthen backup services.  
Level 3: Support workers are evaluated for competency and meet more than once a year to update needed information, to share experiences, and to strengthen backup services.

**Confidentiality and Anonymity**

**Rationale:** Crisis Line Specialists have the right to expect their identity and location to be protected. Callers have the right to expect their identity and information to remain confidential.

**Standard:** The crisis line program is responsible for defining and regulating matters of confidentiality and anonymity as they apply to the local crisis line program.

**Components:** The components of this standard are policies and procedures regarding confidentiality, disciplinary action, anonymity of the caller, and confidentiality of caller information.

**Questions:**

- Does the crisis line program have policies and procedures regarding the confidentiality and anonymity of both Crisis Line Specialists and callers?
- Does the crisis line program have guidelines for disciplinary action?
- Does the crisis line program have a policy governing call record retention and record destruction, which protects the caller's confidentiality?

### **Component 511: Policies and Procedures Regarding Confidentiality**

- Level 0: There are no written policies and procedures regarding confidentiality.
  - Level 1: \*\*There are policies and procedures regarding confidentiality. All employees and staff who have access to and/or use caller information are required to sign a "Pledge of Confidentiality."
  - Level 2: Signed confidentiality forms are evident in employee and volunteer files.
  - Level 3: All guests that may come in CONTACT with confidential information while visiting the crisis center are required to sign a pledge of confidentiality.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

### **Component 512: Policies and Procedures for Disciplinary Action**

- Level 0: There is no written policy regarding disciplinary action.
  - Level 1: \*\*There are guidelines for disciplinary action when confidentiality is broken.
  - Level 2: There are guidelines for disciplinary action when confidentiality is broken, but disciplinary action is not always taken when confidentiality is broken.
  - Level 3: There are guidelines for disciplinary action when confidentiality is broken and they are followed consistently.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

### **Component 513: Anonymity**

- Level 0: There are no written policies regarding anonymity of callers.
  - Level 1: \*\*There are policies and procedures regarding anonymity.
  - Level 2: There are written policies regarding the anonymity of callers and the use of Caller ID. Caller ID and other technologies are used for the benefit of the caller during emergencies, but the guidelines are not always followed.
  - Level 3: Policies regarding anonymity are followed consistently. Callers who wish to remain anonymous are provided with appropriate services and referrals according to agency policies.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

### **Component 514: Call Records Retention and Security (Paper Copy and Computer Data)**

- Level 0: There are no policies regarding call record retention and security.
  - Level 1: \*\*There is a policy that defines the length of time paper copy records are retained and how records are destroyed, but there is no policy with regard to computers and computerized data outside the telephone room.
  - Level 2: Security of records is maintained throughout storage and destruction. Computer information outside the telephone room is password protected as needed to protect the confidentiality of callers.
  - Level 3: These policies are followed consistently.
- \*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION**

## Call Statistics

**Rationale:** Statistics qualify the use of services by the community.

**Standard:** The crisis line program keeps accurate call statistics.

**Component:** The component of this standard is the maintaining of crisis line call statistics.

**Question:**

- Are crisis line call statistics accurately maintained?

### Component 515: Call Statistics

- Level 0: The crisis line program does not keep statistics.  
Level 1: \*\*The crisis line program has a process for keeping accurate statistics, however the statistics are not compiled regularly.  
Level 2: The crisis line program has a process for keeping accurate call statistics and they are current.  
Level 3: The crisis line program keeps accurate, current call statistics. They are reviewed to identify trends.

\*\* MUST ATTAIN A LEVEL 1 FOR ACCREDITATION

## Call Management for Frequent and/or Abusive Callers

**Rationale:** Frequent and/or abusive callers present a challenge to Crisis Line Specialists. Call management prevents burnout and the development of negative, enabling relationships.

**Standard:** The crisis line program has developed effective call management policies/procedures that give adequate direction to the Crisis Line Specialists. These policies/procedures are developed and regularly reviewed. Call management procedures are designed to provide structure and consistency.

**Components:** The components of this standard are written call management policies and procedures.

**Questions:**

- Are there written call management policies and procedures?
- Are there specific directives formulated for frequent and/or abusive callers?

### Component 516: Call Management Policies and Procedures

- Level 0: The crisis line program does not have written call management policies and procedures.  
Level 1: The crisis line program has written call management policies and procedures but they are not consistently followed.  
Level 2: Policies and procedures are followed consistently.  
Level 3: Policies and procedures reviewed annually, with input from appropriate professionals, and updated as needed. Current updates for specific callers as well

as changes in policies are in written form and readily available to Crisis Line Specialists.

### Component 517: Call Management Implementation

- Level 0: There is no attempt to identify frequent callers and/or abusive callers.
- Level 1: Frequent callers and/or abusive callers are identified.
- Level 2: Specific directives are formulated for frequent callers and/or abusive callers.
- Level 3: Crisis Line Specialists consistently follow the directives for frequent callers and/or abusive callers.

## Section Six: Community Integration Standards

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### General Community

**Rationale:** An organization needs to be an integral part of the community and reflect the diversity of the community it serves.

**Standard:** The center enjoys a broad base of community interest, support, and participation. Relationships with community organizations, professional and community leaders, a non-exclusionary policy, and an effective public relations program demonstrate this.

**Components:** The components of this standard are active professional relationships with staff of other community agencies, an effective public relations program, the support of community leadership, and a non-exclusionary policy that encourages participation by persons of various backgrounds, religious beliefs, and/or lifestyles.

**Questions:**

- Are board members and staff relating professionally to the staff of other community agencies?
- Does the center have access to community leaders for consultation?
- Does the center have a year-round public relations program?
- Does the program have a non-exclusionary policy and does the program reflect the diversity of the community?

### Component 601: Professional Relationships

- Level 0: Neither the board nor the staff relate professionally to the staff of other community agencies.
- Level 1: Personnel from the center have some supportive relationships.
- Level 2: The staff and board members have established supportive professional relationships with other professionals in the community.
- Level 3: The staff and board members play a leading role in fostering collaborative professional relationships among personnel from various agencies in the center's service area.



### **Component 602: Relationship with Community Leadership**

- Level 0: The center does not attempt to involve community leaders.
- Level 1: The center attempts to involve community leaders.
- Level 2: The center has the support of community leaders.
- Level 3: The center has established collaborative relationships with community leaders.

### **Component 603: Public Relations Program**

- Level 0: There is no public relations program.
- Level 1: There is an informal public relations program.
- Level 2: There is an organized and effective public relations program in place which creates visibility and recognition throughout the community.
- Level 3: The agency has a functional and regularly updated website and/or participates in social media networks such as Facebook, MySpace, Twitter, Tumblr, etc..

### **Component 604: Non-exclusionary Policy for Volunteers and Staff**

- Level 0: The center does not have a non-exclusionary policy.
- Level 1: The center has a non-exclusionary policy.
- Level 2: The center seeks to broaden the participation of persons of various backgrounds, religious beliefs, and/or lifestyles.
- Level 3: The center reflects the diversity of the community.

## **Human Services Community**

**Rationale:** An organization that provides particular human services must seek the cooperation and win the support of the other human service agencies. Such support may be an important source of referrals.

**Standard:** The center has a working relationship with other human service agencies. The program has a comprehensive listing of referral resources.

**Components:** The components of this standard are human service agency cooperation and referral resources.

#### **Questions:**

- Does the center work cooperatively with other human service agencies in its service area?
- Does the center maintain and use a comprehensive listing of referral resources?

### **Component 605: Human Service Agency Cooperation**

- Level 0: The center's stance toward other human service agencies in its service area is one of non-cooperation.
- Level 1: The center has minimal cooperative relationships.
- Level 2: The center has a good working relationship with other human service agencies.
- Level 3: The center is known and recognized as effective and works collaboratively with other human service agencies.

## Component 606: Information and Referral Resources

- Level 0: The referral resources the center uses are not adequate.
- Level 1: The center uses a comprehensive and up-to-date listing of referral resources or refers callers to the identified I&R resource center for the area.
- Level 2: The center is an identified I&R resource for the area and advertises this service to the public.
- Level 3: The agency publishes a human resources directory and/or maintains an I&R database accessible on the Internet.

## Section Seven: Facilities and Equipment Standards

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### Facilities

**Rationale:** An organization seeking to provide an ongoing service to the public in cooperation with other human service agencies needs an appropriate location and a proper facility. This is especially true of an organization that provides 24/7 services. The staff needs dedicated office space.

**Standard:** The program has secured appropriate locations. It is easily accessible to transportation, is accessible for those with disabilities, and provides safe, secure and attractive facilities. Adequate safety equipment is accessible and functional.

**Components:** The components of this standard are an accessible location, a secure environment, and an attractive and functional facility. Plans for handling threats and disasters are in place. The center meets fire and safety codes.

#### Questions:

- Is the telephone room accessible for current and potential volunteers and paid staff and for those with disabilities?
- Does the staff feel secure when working?
- Does the center have a plan for handling threats of violence?
- Are the office and telephone rooms attractive and clean?
- Does the center appear to be safe? (i.e., smoke alarms, fire extinguishers, fire escapes and/or marked fire exits, etc.)?
- Does the center have a disaster plan in place for the facility and program, covering communication, shelter, continuity of service, and evacuation?
- Is the center accessible for those with disabilities?

## Component 701: Telephone Room Location

- Level 0: The telephone room location is difficult to access.
- Level 1: The telephone room location is not convenient to transportation and/or parking.
- Level 2: The telephone room location is convenient to transportation and parking for volunteers and staff.
- Level 3: The telephone room is accessible to those with disabilities or alternate accommodations are available.

### **Component 702: Security**

- Level 0: The telephone room location and business office are not secure.
- Level 1: Security deficiencies are addressed through policies and procedures.
- Level 2: The telephone room location and facility provide acceptable security.
- Level 3: The telephone room location and facility provide exceptional security.

### **Component 703: Threats of Violence Against the Center**

- Level 0: The center has no procedure for handling threats of violence.
- Level 1: The center has a written procedure for handling threats of violence.
- Level 2: The center has a written procedure and has provided training for handling threats of violence.
- Level 3: The center has a written procedure and has provided training for handling threats of violence. It reviews and updates the procedures annually.

### **Component 704: Fire, Emergency, and Safety**

- Level 0: The center does not appear to meet fire and safety codes.
- Level 1: The center appears to meet fire and safety codes.
- Level 2: Fire, emergency, and safety procedures are posted.
- Level 3: The center appears to meet fire and safety codes. It conducts periodic fire drills and/or has fire emergency procedures posted, and has a procedure for reporting fire and safety problems.

### **Component 705: Disaster Preparedness**

- Level 0: The center does not have a disaster preparedness plan.
- Level 1: The center has a disaster preparedness plan, but it is nonspecific.
- Level 2: The center has developed a written disaster preparedness plan. This plan includes provisions for sheltering on site, communication with staff and family members, and continuation of the crisis line service.
- Level 3: The center has a stock of water, food, first aid materials, and other necessities for sheltering

### **Component 706: Telephone Room Functionality and Environment**

- Level 0: The telephone room is not functional.
- Level 1: The telephone room is minimally functional.
- Level 2: The telephone room is functional and is clean.
- Level 3: The telephone room is functional, attractive, comfortable, and orderly.

### **Component 707: Administrative Office Functionality and Environment**

- Level 0: The administrative office is not functional.
- Level 1: The administrative office is minimally functional.
- Level 2: The administrative office is functional and is clean.
- Level 3: The administrative office is functional, attractive, comfortable, and orderly.

## Equipment

**Rationale:** Equipment should be functional, efficient, and convenient. The center's equipment should also reflect recent advances in technology.

**Standard:** Appropriate computer and telephone technology enhance program efficiency and services.

**Components:** The components of this standard are adequate telephone room and office equipment that contribute to quality service.

### Questions:

- Is the equipment in the telephone room adequate?
- Has the staff received training on the phones, computers, and other equipment?
- Are there policies and procedures in place for the use of computers and Internet?
- Are the computers and Internet accessible?

### Component 708: Telephone Room Equipment: Telephones, Pagers, Faxes, and Related Equipment

- Level 0: The equipment in the telephone room is not adequate.
- Level 1: The equipment in the telephone room is minimally adequate for the program.
- Level 2: The telephone room equipment is adequate for the program.
- Level 3: The equipment in the telephone room incorporates recent technology.

### Component 709: Telephone Room Equipment: Computers and Internet Access

- Level 0: There is no computer in the telephone room.
- Level 1: Crisis Line Specialists have computers in the telephone room, but no Internet access.
- Level 2: Crisis Line Specialists have computers and Internet access in the telephone room.
- Level 3: The center has information technology support to maintain and upgrade the computer hardware and software.

### Component 710: Use of Computers and Internet Availability

- Level 0: Computers and the internet may be used by staff for administrative purposes and/or to compile statistical reports, but they are not used for crisis line work.
- Level 1: The agency has written policies and procedures in place for computer/Internet use.
- Level 2: Computers and the Internet are used by some Crisis Line Specialists to log calls or access information to assist callers.
- Level 3: Computers and the Internet are integral to the work of the Crisis Line Specialists. All calls are logged on the computer and the Internet is used regularly to access information to assist callers.

## **Component 711: Administrative Office Equipment: Telephones, Faxes, Computers, Copiers, and Related Equipment**

- Level 0: The administrative office equipment is not adequate.
- Level 1: The administrative office equipment is minimally adequate.
- Level 2: The administrative office equipment is adequate.
- Level 3: The administrative office equipment incorporates recent technology.

## **Section Eight: Standards for CONTACT USA Membership**

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**Rationale:** Organizations that hold membership in a larger association enjoy the privileges of membership. They also assume certain obligations of membership. Member organizations of CONTACT USA have a responsibility to fulfill these obligations.

**Standard:** The center indicates its membership on publications, uses its logos, pays annual dues, and cooperates with the national program in every aspect that is appropriate to the local center or the crisis line program, such as submitting statistics, other reports, or communicating as requested.

**Components:** The components of this standard are CONTACT USA membership acknowledgment, financial support, and cooperation.

### **Questions:**

- Does the center acknowledge and publicize its membership in CONTACT USA and use its logos appropriately?
- Is the center paying its membership dues to CONTACT USA?
- Does the center cooperate with the national program?

## **Component 801: Acknowledgement of CONTACT USA Membership and Use of Its Logos**

- Level 0: The center does not indicate its membership in CONTACT USA or use its logos on any of its publications, stationery, etc.
- Level 1: The center acknowledges its membership in CONTACT USA and uses its logos on some of its publications and printed material.
- Level 2: The center acknowledges its membership in CONTACT USA and uses its logos on most of its publications and printed material.
- Level 3: The center acknowledges its membership in CONTACT USA and uses its logos on all its publications and printed material where practical.

## **Component 802: Financial Support of CONTACT USA**

- Level 0: N/A
  - Level 1: N/A
  - Level 2: N/A
  - Level 3: \*\*The center is paying its full dues as required.
- \*\* CONTACT CENTERS MUST ATTAIN A LEVEL 3 FOR ACCREDITATION**



### **Component 803: Cooperation with CONTACT USA**

- Level 0: The center does not adequately cooperate with CONTACT USA.
- Level 1: \*\*The center cooperates minimally with CONTACT USA. Statistical reports are submitted but not always on time.
- Level 2: The center cooperates adequately with CONTACT USA. The required statistical reports are submitted to CONTACT USA annually as required for membership.
- Level 3: The center cooperates actively with the CONTACT USA national office; this may include development or modification of national programs or initiatives, planning of or attendance at the annual conference or similar efforts which contribute to the national strength of the organization.

## Statement of Values

### Mission

To provide leadership and support to centers which provide community-based telephone and online emotional support for people in crisis.

### Vision

The support CONTACT USA offers will enable centers to thrive and to provide professional, effective service.

### Value Statement

CONTACT USA is a network of crisis centers helping people to realize their potential, self-worth, and inner resources. CONTACT promotes unconditional regard for and acceptance of all people.

### Values

- **We value people.** We treat all people with respect and courtesy and create an environment of acceptance that supports the attainment of each individual's personal and professional aspirations. We actively promote respect for the confidentiality and dignity of individuals.
- **We Value Excellence.** We value the dedication of all members in our organization to establish and adhere to best practices in the fields of crisis intervention and suicide prevention.
- **We Value Diversity.** We recognize that diversity creates a breadth of perspectives and strengthens our organization.
- **We Value Communication.** We actively promote open communication in a safe and non-judgmental environment.
- **We Value Integrity.** We adhere to the highest ethical standards.
- **We Value Hope.** We believe in helping those who may be considering suicide through prevention, intervention and post-vention efforts.

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_ Date: \_\_\_\_\_

## Core Competencies for Crisis Line Training

Core Competencies details are available through CONTACT USA.

**Standard:** The center's basic training program for persons who volunteer to care for others by telephone is a minimum of 24 hours of classroom instruction and 8 hours of apprenticeship, for a total of 32 hours. A required commissioning ceremony is not included in these hours. The following Core Competencies are required, and focus on producing demonstrable attitudes, knowledge, and skills on the part of those approved and commissioned as Crisis Line Specialists:

- History and orientation
- Active listening skills
- Self-awareness
- Crisis intervention
- Suicide
- Mental Illness
- Depression
- Loneliness
- Frequent Callers
- Grief and loss
- Addictive and compulsive behaviors
- Violence, neglect and exploitation
- Information and referral (where applicable)
- Apprenticeship/Practicum

Centers may add to these areas, according to their needs.



## CONTACT USA Annual Accreditation Document

### Minimum Operating Standards

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- The center has adopted a Mission Statement.
- The center has adopted a formal, written Code of Ethics.
- There are formal, written Bylaws for the center.
- There is a board of directors or governing body for the center.
- The center has an executive director or program director who implements policy and is responsible for day-to-day management of the program.
- The center has an operating budget for the current year.
- The center's financial records are audited or reviewed.
- The center has a basic training program consisting of at least 32 hours.
- The basic training program provides minimal training requirements for Crisis Line Specialists on required Core Competencies.
- The center offers continuing education.
- The center has a non-exclusionary policy for callers.
- A Crisis Line Specialist is always on duty during advertised hours.
- The center has at least one incoming crisis line and a second phone available for emergencies.
- The center utilizes a Suicide Lethality Risk Assessment form.
- The center has written policies and directives regarding intervention on suicide calls.
- The center has a support system for Crisis Line Specialists.
- The center has policies and procedures regarding confidentiality.
- The center has guidelines for disciplinary action when confidentiality is broken.
- The center has policies and procedures regarding anonymity.
- The center has a policy defining the length of time records are retained and how they are destroyed.
- The center stores records in a secure location.

The following standard applies only to centers that utilize call forwarding:

- The center forwards calls to a Crisis Line Specialist who has access to a second phone line for emergencies.
- The following standards apply to CONTACT USA members only:
- The center acknowledges its membership in CONTACT USA and uses its logos.
- The center pays its annual dues to CONTACT USA.
- The following standard applies to non- CONTACT USA members only:
- The center pays its annual accreditation maintenance fee to CONTACT USA.



**We attest that we have maintained the basic minimum operating standards to maintain accreditation through CONTACT USA.**

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Name of Agency

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Board Chair

Date

---

Board Secretary

Date

---

Executive Director

Date

## Site Visit Interviews

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The following is a sample schedule and is subject to change. The general components of the schedule must be covered, but there is flexibility in terms of the order of the interviews. During the site visit, please provide the evaluators with a list of the names and positions of those interviewed. Thank you.

### **Suggested Interviewees for Evaluation Team**

A vital part of the accreditation evaluation site visit is the interviewing of persons who have leadership positions with the local center, and community leaders who have a relationship to the center. Listed below are persons who may be scheduled for an interview with the evaluation team members. Interviews may be individual or in groups, at the discretion of the evaluation team.

Executive Director and/or Crisis Line Program Director

Crisis Line program staff (may be paid or volunteer)

- Trainer(s)
- Supervisor(s)
- Support Worker(s)
- Crisis Line Specialists (include experienced and more recently certified)

Board representatives

Persons responsible for:

- Planning
- Public relations/publicity
- Fund raising/finance
- Personnel

Community leader(s)

- Representative(s) of major funders
- Representative(s) of local human service provider(s)

Other key leader(s)

## Accreditation Site Visit Schedule (sample):

### Day One (site examiners arrive):

Time	Event	Attendees	Topic	Materials
6:30 pm	Dinner	Director and Board President	General Introduction to Agency	None specified

### Day Two (morning)

Time	Event	Attendees	Topic	Materials
9:00 – 9:30	Tour of facility	Staff	Bldg, equipment, etc	
9:30 – 10:00	Interview	Fiscal/Bus Mngr	Finances	Treasurer's Reports and audit
10:15 – 11:00	Interview	Training Director	Training and recruitment; continuous training	Training Manual, schedule, recruitment materials, etc
11:00 – 11:30	Interview	Recent trainee	"	
11:30-12:00	Interview	Community Supporter (ex. United Way or similar funder)	Agency collaboration, public perception, etc	
12:00 – 1:00	Lunch	Staff, Board Members, volunteers, etc	General discussion	A simple lunch brought in is best

Site examiners will require a space to work throughout the day. If possible, this space should be away from the main traffic areas (with a door that can be closed) and contain a table and chairs with access to electrical outlets and internet capability if possible.

**Day Two (afternoon)**

Time	Event	Attendees	Topic	Materials
1:00 – 2:00	Interview	Phone worker manager	Coverage & scheduling, call management, worker management	Shift schedule, call logs, lethality assessment, etc
2:00 – 2:30	Interview	Phone worker with longer service	General Discussion	
2:45 – 3:15	Interview	Support staff member	General Discussion	
3:15 – 4:00	Team meets	CUSA Examiners will talk alone, but ED should be available for last-minute questions or clarifications	Discussion and scoring	
4:00 – 5:00	Exit interview	ED, Board Pres, and others at discretion of the center	Summary of findings, scoring, recommendations	

**Day Three (site examiners depart):**

Team writes report for submission to CONTACT USA.

**Additional Info:**

- Phone workers/specialists refers to volunteer or paid staff who answer the hotline
- Schedule is flexible. Feel free to “juggle” interviews according to people’s needs
- Agency is responsible for paying for lodging, transportation and meals during the site visit. There will also be a per diem charge for meals and expenses incurred by examiners while they are traveling to and from the location (typically one day’s per diem of \$60). Examiners will arrange their own airfare and Agency will be billed later.

We hope that your site visit will be a relaxed and supportive experience for you. Feel free to CONTACT your site examiners with any questions before, during and after your visit. Our aim is to help you create and maintain a strong agency!

## Accreditation Pre-Screening Questionnaire

**Name of Center:** \_\_\_\_\_

Please complete this pre-screening questionnaire by marking an X in the appropriate box beside each question as the question pertains to your center or crisis line program. If the answer to any of these questions is “no”, please explain on the reverse of this form.

	Yes	No
1. Has the center adopted a Mission Statement?	<input type="checkbox"/>	<input type="checkbox"/>
2. Has the center adopted a formal, written Code of Ethics?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are there formal, written Bylaws for the center?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the center have a board of directors or governing body?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the center have an executive director or program director or person designated to fulfill the duties and responsibilities of that position?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the center have an operating budget for the current year?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are the center’s financial records audited or reviewed?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the center’s basic training program total at least 32 hours?	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the center’s basic training program provide at least minimal training requirements for Crisis Line Specialists on required Core Competencies?	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the center offer continuing education?	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the center have a non-exclusionary policy for callers?	<input type="checkbox"/>	<input type="checkbox"/>
12. Is a Crisis Line Specialist always on duty during advertised hours?	<input type="checkbox"/>	<input type="checkbox"/>
13. Does the center have at least one incoming crisis line and a second phone available for emergencies?	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the center utilize a Suicide Lethality Risk Assessment form?	<input type="checkbox"/>	<input type="checkbox"/>
15. Does the center have written policies and directives regarding intervention on suicide calls?	<input type="checkbox"/>	<input type="checkbox"/>

- 16. Does the center have a support system for Crisis Line Specialists?
- 17. Does the center have policies and procedures regarding confidentiality?
- 18. Are there guidelines for disciplinary action when confidentiality is broken?
- 19. Does the center have policies and procedures regarding anonymity?
- 20. Does the center have a policy defining the length of time records are retained and how they are destroyed?
- 21. Are records kept in a secure location?

The following question applies only to centers that utilize call forwarding:

- 22. Does the center forward calls to a Crisis Line Specialist who has access to a second phone line for emergencies?

The following questions apply to CONTACT USA members only:

- 23. Does the center acknowledge its membership in CONTACT USA and use its logos?
- 24. Is the center paying its annual dues to CONTACT USA?

Signature: \_\_\_\_\_

Title \_\_\_\_\_ Date \_\_\_\_\_