CETA Volunteer Handbook

This is a living document. Feel free to make comments and suggestions directly on the document or send them to CETA leadership via Slack or email. Please also let us know if you find any missing or broken links.

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1. Quick Summary: Volunteering for CETA

Thanks for your interest in volunteering for CETA. [CETA](#) was born out of [research](#) at Cornell Tech on tech abuse in intimate partner violence (IPV) and has been operating since November 2018. CETA is powered by volunteers who believe everyone should be free to use technology without fear of harm from abusive partners or others. We work directly with survivors to help determine if someone is using technology to harm them -- and what they can do to stay safe. We also facilitate cutting-edge research to understand how abusers can misuse technology.

This handbook aims to provide important information relevant to your experience and involvement as a CETA volunteer, including training, roles and expectations, links to important resources, and more.

IPV survivors are called clients in this context. Clients are referred to us through our partnerships, currently with the New York City Mayor's Office to [End Domestic and Gender-Based Violence](#) (ENDGBV) and the Anti-Violence Project (AVP). The ENDGBV is the municipal organization whose mission is to support survivors of not only IPV but other forms of gender-based violence. The Anti-Violence Project is an anti-violence organization dedicate to serving specifically the LGBTQ+ and HIV-affected communities.

Our clinic model has evolved over time. Currently, we help ~10-25 clients per month. IPV support professionals (case managers, social workers, lawyers, etc.) submit a referral to us, and we assign a volunteer to be a case lead. The case lead schedules a call or otherwise reaches out to the client to ascertain what their technology concerns are and how we might help them navigate their situation.

Most of our appointments are remote, but we offer in-person meetings on an ad hoc basis. Criteria for meeting with clients in-person is based on (1) availability of consultants located in the New York City area, (2) potential benefit to the client, and (3) the capacity of the partner agency to host an in-person meeting.

We only help with technology issues; our partner agencies provide referrals for clients to access safety planning, legal assistance, housing assistance, etc.

New CETA volunteers proceed through a sequence of trainings on the clinic background and history, IPV, client-centered counseling, self-care, technology abuse, and CETA procedures. The trainings in total will require 10-12 hours spread across several (e.g., 4) sessions. After completing training, volunteers proceed to become shadowers, in which they listen in on consultations between more senior volunteers and clients. After that, volunteers graduate to active roles where they can assist more senior volunteers in client cases. Finally, the volunteer moves on to being a case lead. Throughout we emphasize volunteer well-being, and will gradually help you become comfortable doing the rewarding work of helping clients. We provide refresher trainings in our group meetings and 1:1 or small group orientations as volunteers transition between roles.

We ask that volunteers, after training, can commit ~10 hours of time per month; approximately one appointment per week. We purposefully want you to be able to meaningfully contribute to CETA without impeding your work, education, or other interests. Most activities happen during business hours (Eastern time zone) Monday through Friday, with case leads running scheduling. The primary work is helping with client cases, for example, helping clients diagnose if their email or social media

accounts are compromised, helping them check for malicious spyware that may have been installed on their phone, understanding options for reporting harassment online, and more. We provide training on the most frequently encountered issues, and have resources for helping volunteers understand security concerns so that they can, in turn, help inform clients about their options.

Finally, in addition to working with clients, there are potential opportunities in CETA to get involved in academic research, legal advocacy, software development, resource development, and external tech training programs for IPV stakeholders.

2. Volunteer Onboarding Checklist

- Fill out and email either [redacted] ([redacted]) or [redacted]
  - a Volunteer Profile form
- Review Policies 6.3 (Consensual relationships) & 6.4 (Prohibited Discrimination, Bias, and Harassment) and 6.5 (University Volunteers)
- Join CETA's Slack Team and ask to be added to the #clinic-practice channel
- Add your information to the CETA personnel roster. We will request a Cornell NetID login for you, and login instructions will be sent to the email you provide on the roster.
- Add your name and bio to the CETA Member Gallery. Feel free to have a flick through to get familiar with faces.

Additional Useful Links

- Website (and public CETA resources)
- Slack Team
- Leadership:
  - [redacted]
- Weekly team meeting agenda + Zoom info
- Personnel roster + contact information
- Case management & appointment scheduling spreadsheet
- Client FAQs and Common Tech Topics for CETA Volunteers
- Guide for Case Leads
- Academic Research Website

3. CETA's Mission, Values, and Policies

CETA's mission is to end tech abuse. We guide our work & partnerships by the following principles:

- We believe everyone should be free to use technology without fear of harm from abusive partners or others.
- We believe and respect survivors. When we provide them with advice, we aim to help give them the information they need to make their own decisions. We honor the fact that survivors know their own situations best.
- We aim to serve survivors from all walks of life and are committed to being inclusive and culturally competent. We are sensitive to the needs, desires, and perspectives of all groups of people.
- We embrace human rights and believe everyone deserves equal rights and dignity.
- We recognize intersectional discrimination and abuse, and seek to end them.
- We are collaborative and strive to create strong, equal partnerships with other organizations. We value the expertise of all IPV professionals -- and survivors.
- We believe larger societal problems such as racism, economic injustice, misogyny, homophobia and transphobia, ableism, and agism contribute to intimate partner violence. We expect everyone involved in CETA to embrace the importance of equality and justice.
- We believe accountability is an important part of justice for survivors. We are committed to ensuring that no one uses involvement with CETA as a way to avoid accountability for abuse.

Team Values and Guiding Principles

- Volunteers' well-being comes first
- We don't expect perfection – we value skills, commitment, empathy, & team spirit
- We believe and respect the survivors
- We empower survivors to make their own decisions
- We collaborate with and support each other
- We are patient, professional, and thorough
- We are sensitive to the needs, desires, and perspectives of all groups of people, and we respect everyone's equal rights and dignity
- We respect and value everyone who helps make this project a success, such as support workers and interpreters

CETA and Cornell University Policies

CETA is a part of Cornell University and ascribes to Cornell's policies, including:

- Policy 6.3: Consensual Relationship Policy
- Policy 6.4: Prohibited Bias, Discrimination, Harassment, & Sexual & Related Misconduct
- Policy 6.5: University Volunteers
- Volunteer agreement

Important: CETA has a zero-tolerance policy for sexual harassment, bigotry, and gender or race-based bias. Consensual romantic relationships between volunteers should be disclosed to CETA leadership.

4. New Volunteer Training

Our training program focuses on equipping all volunteers, regardless of prior background, with basic knowledge of IPV and gender-based violence, self-care and secondary trauma, trauma-informed counseling, common types of technology abuse, and how to help clients secure their technology. The training is broken down into the following four sessions, with each session lasting 2-3 hours:

Part 1. Introduction to CETA (2 hours)

Organizational structure
       CETA leadership and administration
       Volunteer corps
       Key partner organizations
       Mission, values, policies
Background and history of CETA
       Past and ongoing research studies
Clinic settings and procedures
       Case management
       Appointment flow
       Team meetings and communication
       Data collection and record keeping
Volunteer roles and responsibilities
       The Shadower Role
       The (Second) Consultant Role
       The Case Lead Role
       Volunteer limitations, boundaries, safety, anonymity
Other core CETA activities
       Creating resources for CETA
       Legal/policy advocacy
       Tech abuse trainings and webinars
       Developing software, analytical tools, and data infrastructure
       Academic Research

Part 2. IPV 101; Secondary Trauma and Self Care (3 hours)

Basic introduction to IPV
Secondary trauma and self-care

Part 3. Talking with Clients (2 hours)

Trauma, bias, and privilege
Trauma-informed approaches
Active listening and validating
Working with an interpreter

Part 4. Discovering and combating tech abuse (3 hours)

Client case management and appointment flow
Common types of tech abuse
Understand-Investigate-Advise framework
Follow up and post-appointment communication
Getting further tech support

Part 5: Evidence Documentation + Legal Considerations

It is common for clients to want our assistance with collecting evidence for court cases. On occasion, they will also ask for us to provide expert or witness testimony, in writing or in person, describing what we found during a consultation. This section discusses our official guidance for navigating such requests.

Encourage self-documentation: We do not retain evidence or documentation (e.g. screenshots, records of account activity, log-in information) of personal data encountered during an appointment. However, if we find unusual or suspicious activity that corroborates the idea that the abuser was accessing or tampering with the client's devices or accounts, we can encourage them to document it themselves by taking a screenshot or saving records to auxiliary storage. This serves the dual purpose of preventing CETA volunteers from direct involvement while still allowing the client to preserve evidence.

Provide written summaries: Typically we send a post-consultation summary, detailing what steps we took and what we found. With the client's permission, we can also send this information to their caseworker. This summary provides an anonymized record of what we found and is usually sufficiently comprehensive of a client's activities with CETA.

Requests for expert testimony: We do not consider this within the scope of services provided at CETA, and would never ask nor expect a volunteer to assent to such a request. If you receive such a request, you may let the case worker know that the client asked for a documentation of service for legal purposes and remind them that this is not within our ability. You can and should feel free to contact the leadership team for additional support.

A note from our lawyers: We cannot 100% guarantee that CETA will never be subpoenaed to testify in a court case, as the clinic does not hold a confidential legal status shielding us from subpoenas. However, this has never happened in the history of CETA. We recommend the above steps (encouraging self-documentation, providing written summaries, and communicating the scope of our services) because, in addition to being good practice, they are usually sufficient to prevent the need for individual testimony.

5. Communication, Operations, and Admin

CETA Team Meeting

We hold bi-weekly team meetings / office hours that we use to discuss CETA activities, debrief on cases, do ad-hoc or refresher trainings, or check-ins with volunteers. We **strongly**

encourage all CETA members to join the meeting if they can. Please let us know if you have a conflict. Each Friday following the team meeting, we will send out a newsletter summing important news and sharing any recordings that happened during the meeting; if you cannot make the meeting, please ensure you read the newsletter.

When: The agenda, linked below, has the next date of each group meeting at the top. Currently they are every other Tuesday at 4pm EST. Agenda + Zoom

Slack

We have a Slack team that we use for the bulk of CETA communication, including letting people know about upcoming appointments to sign up for, discussing issues that arise, asking questions about cases/appointments, asking for additional support with tricky tech abuse problems, coordinating backchannel communications during appointments, and more. Do not post any identifying client information on Slack (use case IDs instead).

🏳️‍🌈 **Slack Etiquette:** We encourage everyone to set their display name to whatever they are comfortable being called. Likewise, we as a community will endeavor to use those names unless directed otherwise. We also encourage everyone to add their pronouns (although we do not require it), and to make a habit of glancing at each other's pronouns when writing messages/tagging each other on Slack. This information is also in our Members List resource, but the easy convenience of Slack display names is especially helpful. To change your display name, click on your icon in the top right-hand corner, and select **Profile.** Then click **Edit** next to your name, and make the changes in **Display Name.** You also have the option to add a phonetic pronunciation of your name if desired.

> **Slack Team**: link (we will add you)
> Ask to be added to **#clinic-practice** and feel free to explore other channels. You can browse the other channels by hovering over "channels" in the side bar and clicking on the + icon. Some useful ones to join:
>
> **#advocacy** legal and policy advocacy discussion
> **#techsupport** open channel for asking questions about technology issues encountered with clients or in other places (as opposed to clinic-practice which is limited to volunteers)
> **#writtenguides** for developing guides published on our website

Email

We use CETA's volunteer email listserv for announcements and important communication.

> **Listserv**: [redacted] (we will add you)

Case leads are also assigned a CETA-specific email (e.g., [redacted]) and RingCentral phone number for communicating with clients/case workers. Information about using these properly is in the case lead guidance. Do not use personal email accounts for communicating with clients.

Cornell NetIDs

All CETA volunteers will receive Cornell NetIDs that provide access to Cornell licensed services and software products, e.g., email, Zoom, Box, RingCentral. We will request NetIDs for you. However, note that it can take some time for NetID requests to be approved, so we also have short-term workarounds (e.g., guest access to Box files for your own email address). Ask us if you're confused or need anything.

Box

We use Cornell-licensed Box for case management and client data, including data related to specific client cases (e.g., notes, recordings) and client-related research data (e.g., coded transcripts of client interactions). We control access to Box carefully, granting access to specific volunteers and specific files on a case-by-case basis.

Google Drive

We use Google Drive for all non-client specific data and documents, such as training slides, clinic resources, academic papers, logistics, etc. Our access policy for Google Drive is fairly liberal and may include CETA volunteers, students, interns, internal and external collaborators, and others. Do not upload or store any client data to Google Drive (and if you find client data there, please let us know).

Case and appointment tracking: spreadsheet [redacted]

Zoom

We use Cornell-licensed Zoom for internal communication (i.e., team and 1:1 meetings), internal and external trainings (e.g., webinars), client appointments, etc. For non-client communications (e.g., meetings) you can join the Zoom meeting from any account.

For client appointments, we have a CETA-specific Zoom account. As a CETA volunteer, you will receive access credentials when necessary to participate in client appointments.

RingCentral

We use Cornell-licensed RingCentral to call and text clients from a "regular" phone number. RingCentral is a convenient option for calling a client to set up an appointment. It also provides conference call functionality that should work with remote language interpretation services should clients need them.

Case leads will receive a Cornell RingCentral account with an assigned, unique, phone number.

6. Security Procedures

CETA handles a variety of highly sensitive data. To provide service, volunteers must handle client PII (personally identifiable information) such as names, telephone numbers, and email

addresses. Details of client cases may also be quite sensitive, with identifying information (what applications or devices a client uses, the particulars of the technology issues they experienced). Finally, for research purposes we often audio record consultations.

It's everyone's responsibility to safeguard client information. A leak of sensitive information such as a transcript onto the public internet would be a disaster of the highest order.

As implied in the previous section, CETA handles two types of data: client specific and non-client specific.

Client-specific Data

Client-specific data should only be stored on Box, in a client case folder. Examples include:
- Client case notes
- Call recordings

Note that client contact information is **not** stored on Box. Explicit client PII (name and contact info) is stored only in a case lead's CETA email address (e.g., [redacted]). Never save it anywhere else, and never post any information on Slack. If another case lead needs access to it, you must forward this information to their CETA email. Do not use personal or other work email accounts for communications with clients.

Recordings should only be stored long term on Box, in a client's case folder. If you make a recording locally on your computer, upload it immediately to Box after the consultation, and then delete the local copy. Ensure it is removed from any trash bin.

Client case notes should be stored only on Box. If you take notes on a piece of paper, or with a local text editor on your computer, you should transcribe these to the case folder case notes document after the call and destroy/delete the local physical/digital notes.

Client-specific data must be accessed only via your Cornell NetID, which by policy must have a strong password (do not reuse passwords from your other accounts) and with 2FA enabled. You must also be responsible for ensuring any device you use to access client-specific data remains free of malware; consider installing anti-virus software, be vigilant for phishing emails, and be careful about installation of software on the device.

Non Client-specific Data

When asking for support with a case on Slack, use the client case number. You can ask about technology issues faced by a client, but avoid revealing any client-specific information. If in doubt about what is appropriate to share, ask on #clinic-practice.

Our Google Drive data is a mix of public information (such as technology guides) and more sensitive documents. The sensitive files are:
- **Appointment and case tracker**. This does not include client identifiers, but should nevertheless never be shared outside CETA.

- **CETA personnel roster**. This contains information about CETA volunteers that we should not widely share for volunteer privacy and safety.

Do not share links to these files with anyone outside CETA. If you find you need access to these documents, let us know what email address you plan to use and we will grant you access.

You may access Google drive using your personal email accounts, but any account that has access should have a strong password and have 2FA turned on.

7. Self-care and Volunteer Wellness

As covered in the volunteer training, working with IPV survivors can lead to secondary trauma. Volunteer well-being is paramount. We encourage all volunteers to practice self-care, and to reach out should they ever be feeling symptoms of secondary trauma (e.g., being exhausted, feeling depressed or overwhelmed, etc.). You can always message or email the CETA leadership (Nicki or Tom) as well as other volunteers to chat. Sometimes just talking about difficult cases can be helpful to process them. We also encourage you to come discuss with CETA leadership how you're feeling, since we may want to scale back your workload temporarily or otherwise adjust your CETA volunteer experience to make sure we avoid burnout.

8. Other CETA activities you can get involved in

Creating CETA Resources

CETA's website provides a collection of materials, tools, and resources that our volunteers have created to help survivors, support workers, and others discover and address tech-related risks (https://www.ceta.tech.cornell.edu/resources). Many of these are step-by-step and how-to guides for checking and managing specific apps or platforms.

All resources are publicly available and free for anyone to download and use. We often hear from other organizations that are using our resources in their work with survivors. We also frequently use them in our own work with clients.

We maintain a list of new resources that we want to create and we encourage volunteers to also propose new resources they think would be useful -- either internally, externally, or both. For example, creating a new step-by-step guide to check security and privacy settings for a specific app might take a few hours. **Please let CETA's leadership know** if you are interested and have time to devote resource creation.

Tech Safety Trainings and Webinars

In addition to meeting with individual clients, CETA's volunteers also deliver external tech trainings and webinars that aim to equip support workers, case managers, and survivors with basic knowledge about tech safety and recognizing tech abuse.

Since the start of the COVID-19 pandemic, all external trainings have been administered as webinars via Cornell-licensed Zoom. Organizations interested in receiving training often reach out to us and ask us to present to their group and, depending on volunteer time and interest, we accommodate their requests if we can. Webinars typically involve two volunteers and last 1-2 hours. We have already created training materials that can be reused/adapted to accommodate different groups, depending on the audience targeted (although we could always benefit from more). **If you are interested in participating**, feel free to respond to periodic requests on Slack about upcoming trainings we're running, or speak to CETA's leadership about your interest.

Legal and Policy Reform

We advocate for better legal/policy protections for IPV survivors at both federal and state levels. For example, we led a letter to Congress from 10 organizations calling for a law giving abuse survivors throughout the US a right to get out of phone plans they share with their abusers. This led to the Safe Connections Act in the US Senate. We are also working with NY State Senators to propose similar legislation in New York State.

Nicki and Tom are not lawyers or policy experts; we rely on enthusiastic volunteers to lead this work. We have a channel -- **#advocacy** -- on our Slack team for discussing CETA's advocacy work. Please join this channel if you are interested in following or participating. Please also **let us know** if you have new ideas/expertise in this space or capacity to lead new efforts.

Developing software, analytical tools, and data infrastructure

We also do substantial technical work. There is always room for people interested in learning or flexing technical skills to help the clinic run more efficiently, and to help us create a platform for IPV research. Current projects include:

- Building a proper infrastructure for the clinic -- data pipelines, CMS, frontends, integrations, everything. To get involved, DM [redacted]on Slack with a brief description of your experience and interests in at least one of the following:
    - Backend / frontend / full-stack web app development. We're building on Docker / Node / Express / Sequelize / Postgres / React.
    - Web interface design
    - Data engineering

- Building tools to help researchers (both ourselves and others) better analyze the data we produce in every client case. To get involved, DM [redacted] on Slack with a brief description of your experience and interests in at least one of the following:
    - NLP
    - Data engineering
    - Qualitative / interpretive analysis (esp. grounded theory)

<u>Academic research</u>

Nicki and Tom also run an active academic research group studying the role of technology in IPV. This includes academic research on CETA's work as well as a range of other relevant projects that are more tangential to CETA. You can peruse the academic research website to read papers we have published and learn about our research projects. Talk to Tom and Nicki if you're interested in getting involved in academic research projects.

9. Leaving CETA

Of course, we understand that you will probably not be able to work as a CETA volunteer forever. When the time comes for you to move on, we ask that you try to give us as much notice as you are able---at least a few weeks and ideally several months---so that we have time to plan and distribute the workload among remaining volunteers. Our priority will be to avoid the need to cancel client cases/appointments or other things (e.g., external trainings) that we have committed to, as well as make sure that none of our volunteers are overburdened by the need to cover extra work at the last minute.

As soon as you know that you intend to end your volunteer relationship with CETA, please email CETA leadership (Nicki and Tom) to let us know and provide your anticipated end date. You are not required to tell us your reasons for leaving (although, of course, we would welcome knowing them). We will thank you for your valuable contributions and wish you well in future endeavors!