**Participant Intake Questionnaire**

\* Indicates a required question

To be completed by the Program Manager or an agency staff person with the participant over the phone.

First Name: \*

Last Name: \*

E-mail Address: \*

Phone: \*

Street Address: \*

City, State, ZIP: \*

Birth Date (Month, Day, Year): \*

Gender Identity: \*

Preferred Pronouns: \*

For demographic purposes only, please describe yourself (select all that apply):

* American Indian or Alaska Native
* Asian
* Black or African American
* Hawaiian Native or Other Pacific Islander
* Hispanic, Latino or Spanish Origin
* White
* Other (please specify):

Primary language if not English:

* Arabic
* Chinese (please specify dialect):
* French
* German
* Italian
* Japanese
* Korean
* Russian
* Spanish
* Other (please specify):

How did you hear about the Friendly Calls Program? \*

* Family member, friend or neighbor
* Doctor’s office
* Counselor or social worker
* Senior center (please specify):
* Other community organization (please specify):
* Government agency/local elected official (please specify):
* Google or other internet site (please specify):
* Social media
* Other (please specify):

Hobbies, Skills, Interests (select all that apply):

* Art
* Cooking
* Crafts
* Current events
* Exercise
* Games
* Movies
* Music
* Pets
* Reading
* Religious life
* Shopping
* Television
* Walking
* Writing

Why are you interested in participating in the Friendly Calls Program? \*

Other Information

Hearing:

* Good
* Fair
* Poor

Vision:

* Good
* Fair
* Poor

Mobility:

* Good
* Fair
* Poor

Emergency Contact 1 \*

Relationship:

First Name:

Last Name:

E-mail Address:

Phone:

Emergency Contact 2 \*

Relationship:

First Name:

Last Name:

E-mail Address:

Phone:

## Program ­­Guidelines for Participants

To be sent by mail to the participants. This document is for them to keep.

The purpose of the Friendly Calls Program is to introduce you to a volunteer who is looking forward to speaking with you weekly for social conversations over eight weeks. The program is meant to be enjoyable and an opportunity to spend time with someone you might not have otherwise had a chance to meet. These guidelines are intended to provide general information about the program and this new relationship.

* Once you have signed up, the Program Manager will give you a general idea of how long it will take to pair you with a volunteer. Please make a note of this date range and be on the alert for a call from a person who will identify themself as part of the Friendly Calls Program.
* The volunteer will make an initial call to introduce themself and plan a schedule for your weekly calls. Please think about a day of the week and time of day that will work for you on a regular basis. You and the volunteer both need to make sure the time is convenient. If you need to get your calendar or planner to do this, please let the volunteer know and they will wait for you to do so.
* The volunteer will be given your first name, last initial and phone number. To protect your own privacy, we ask that you do not share other identifying information with the volunteer.
* Likewise, the volunteer will share only their first name and last initial with you. Please do not ask them for additional identifying information.
* You are making a commitment to participate in eight weekly 20- to 30-minute calls with the volunteer. If you are under the weather, you should feel comfortable letting the volunteer know; it is okay to occasionally skip a week or to reschedule if that works for both of you.
* During the calls, we hope that you will talk about hobbies, interests and life experiences that help you and the volunteer enjoy each other’s company. It may take some time for you and the volunteer to develop a comfortable, conversational rhythm. Please be patient while your relationship is developing, and know that gaining comfort takes time for some people.
* The initial Friendly Calls series lasts eight weeks. If both you and the volunteer would like to extend your interactions and continue speaking after the eight-week series, please discuss this with the Program Manager. You should not, however, feel obligated to make this commitment.

**Participant Agreement**

This Agreement confirms the terms and conditions of your participation in the Friendly Calls Program operated by (insert name of agency).

The Friendly Calls Program is going to pair you with a volunteer who is eager to speak with you regularly and get to know you.

We hope you will review the information below carefully, sign this form and return it via e-mail or mail to (insert name, e-mail address and mailing address of the Program Manager).

As a Friendly Calls Participant, I agree to:

* Provide all information required to register for the Friendly Calls Program to the Program Manager.
* Follow all rules and guidelines of the program.
* Adhere to all local, state and federal laws and behave with the highest level of integrity in the program.
* Avoid disclosing identifying information about myself.
* Preserve the confidentiality of any personal information the volunteer may share with me.
* Not use my participation in the program for personal or financial gain.
* Contact the Program Manager with any concerns I have about my participation in the program, the volunteer’s communication or my own personal situation.

Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**Participant Feedback Form, Initial Call Series**

This document can be sent by mail or e-mail (depending on the recipient) to the participant, along with the guidelines and Participant Agreement. The participants should send back this form at the conclusion of the first eight weeks.

Thank you for participating in the Friendly Calls Program. We hope that you have enjoyed your experience thus far. Please provide us with feedback about the program. This is also a good opportunity to let us know if you would like to continue speaking with your volunteer caller beyond the initial eight-week commitment.

First Name: \*

Last Name: \*

E-mail Address: \*

Phone: \*

Name of Friendly Caller: \*

Date you completed your call series:

Overall, how would you rate your experience with Friendly Calls? \*

* Excellent
* Very Good
* Good
* Fair
* Poor

What are the main reasons for your rating? \*

How have you been communicating with your volunteer? \*

* Phone
* Video chat, such as Zoom, Skype, Facetime

If you responded “phone” to the question above, would you be interested in video chat?

* Yes
* No

What would be the main barrier to participating by video chat?

During the course of your calls, did your volunteer mention anything that you found concerning? Is there anything the Program Manager should know? Please explain.

Would you and your volunteer like to continue Friendly Calls for an additional eight weeks? \*

* Yes, I am interested and will arrange this with my volunteer.
* Yes, I am interested, but I would like the Program Manager to be in touch with me prior to continuing my calls.
* No, I am not interested in further calls with this volunteer, but I would like to be matched with another volunteer.
* No, I am not interested in continuing with the program.

Thank you for your feedback!

Please return this form via e-mail or mail to (insert contact information).

**Participant Feedback Form, Additional Call Series**

This document can be sent by mail or e-mail (depending on the recipient) to the participant if they choose to continue speaking beyond the initial eight weeks. It should be completed by them at the end of each additional eight-week call series beyond the first one.

Thank you for participating in the Friendly Calls Program. We are glad that you enjoyed the program so much that you decided to participate again. Please provide us with additional feedback about the program. You may also use this form to let us know if you wish to continue speaking with your volunteer for an additional eight weeks.

First Name: \*

Last Name: \*

E-mail Address: \*

Phone: \*

Name of Friendly Caller: \*

Date you completed your call series:

How long have you and your volunteer been participating in Friendly Calls? \*

* We just completed our second eight-week call series.
* We just completed our third eight-week call series.
* Other (please specify):

Overall, how would you rate your experience with Friendly Calls? \*

* Excellent
* Very Good
* Good
* Fair
* Poor

What are the main reasons for your rating? \*

How have you been communicating with your volunteer? \*

* Phone
* Video chat, such as Zoom, Skype, Facetime

If you responded “phone” to the question above, would you be interested in video chat?

* Yes
* No

What would be the main barrier to participating by video chat?

During the course of your calls, did your volunteer mention anything that you found concerning? Is there anything the Program Manager should know? Please explain.

Would you and your volunteer like to continue Friendly Calls for an additional eight weeks? \*

* Yes, I am interested and will arrange this with my volunteer.
* Yes, I am interested, but I would like the Program Manager to get in touch with me prior to continuing my calls.
* No, I am not interested in further calls with this volunteer, but I would like to be matched with another volunteer.
* No, I am not interested in continuing with the program.

Thank you for your feedback!

Please return this form via e-mail or mail to (insert contact information).