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# The New York State Friendly Calls Program

## Volunteer Manual

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*Local Agency Logo Here*

The Friendly Calls Program was developed through a partnership between:



DOROT, a nonprofit social service organization based in New York City, brings the generations together to create meaningful connections for older adults. For more than 45 years, DOROT's life-enhancing programs and services - offered onsite, within the community, and in older adults' homes - have fostered a sense of community and alleviated social isolation and loneliness. Organizations throughout the U.S. have developed programs based on DOROT's innovative intergenerational and volunteer-led models for social connection. To learn more, visit [www.dorotusa.org](http://www.dorotusa.org).



The mission of the Association on Aging is to support and enhance the capacity of New York's local Area Agencies on Aging and to work in collaboration with the aging network to promote independence, preserve dignity, and advocate on behalf of aging New Yorkers and their families. The Association is the not for profit membership organization that is dedicated to supporting older residents, their families, and the network that supports them. For more information, visit [www.agingny.org](http://www.agingny.org).

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## Purpose of the Friendly Calls Program

The New York State Friendly Calls Program was developed with funding from the Building Resilient Inclusive Communities project. This national initiative seeks to establish sustainable programming within existing state-level efforts to promote healthy living and reduce social isolation. As part of this project, the New York State Office for the Aging partnered with the New York State Department of Health, AgingNY, DOROT and BrainMatters, Inc., to design and produce a Friendly Calls training package intended to facilitate social connectedness among individuals who may be experiencing isolation due to the COVID-19 pandemic or for other long-standing reasons. This training provides necessary tools that enable local Area Agencies on Aging and NY Connects No Wrong Door providers to implement Friendly Calls Programs in their localities.

Human beings are wired for connection. Yet at no other time in history has this impulse been so fundamentally disrupted, due to COVID-19 pandemic restrictions on social interaction adopted in the interest of public health and personal safety. Aging services providers have been nimble in their response to this crisis, doubling down on existing tools and embracing new approaches to help people suffering the unique pain of social isolation during the current health crisis. The Friendly Calls Program is one of these tools. It connects people through weekly telephone conversations that foster connection, reduce social isolation and cultivate relationships between participants. These interactions between volunteers and “friends” ultimately improve mental and physical health, which reduces the need for other services or supports, especially with guidance and assistance from local Program Managers.

Often, the volunteer’s desire to help a neighbor in need is doubly rewarded: both lives are deeply and positively affected by the special bond of conversation. The privilege of talking to another person who listens with care is invaluable, and one phone call from a friendly voice can cast light in both directions during an otherwise distressing time.

## Social Isolation and Social Connectedness

What is social isolation? Why is it important to understand and address? Being socially isolated means that a person lacks meaningful relationships and interactions and doesn't have people they can count on for support. "In recent decades, the number of people with zero confidants has nearly tripled, and more than 40% of adults do not belong to a local community group." (*Scientific American*, 2020). Even before the COVID-19 pandemic, social isolation was a serious public health concern.

We are all social beings at our core. We thrive through relationships with one another. We depend on one another. We support one another. The absence of having others to turn to creates social disconnectedness, which can have a significant and detrimental impact on our health and well-being.

Relationships are important for all of us and, in particular, for older adults. Research shows that older adults who remain socially engaged experience a greater likelihood of survival (Holt-Lunstad et al., 2010), a decreased risk of disability in activities of daily living (James et al., 2011) and a decreased likelihood of depression (Golden et al., 2009).

There are many reasons that we become more isolated as we age. These include retirement from full-time employment that added structure and meaning to the day, reluctance to ask for help, limited mobility or health issues that make it difficult to leave home, family members who live far away, and the deaths of partners, family members and friends. Many of these same challenges hold true for people with disabilities, and those who are caregivers are often isolated because of the demanding nature of this role. Even people who have schedules filled with activities and appointments can feel isolated if they have experienced a decline in the number and quality of their relationships. Many people who feel socially isolated are also lonely.

The good news is that despite these challenges, there are ways to enhance connections at any stage of life. One of these is through participation in an activity like Friendly Calls. As a volunteer in the program, you will be reaching out to another person who is seeking opportunities to broaden their horizons and expand their connections. You will provide dependable and caring conversation. And you will receive the opportunity to learn, build a new friendship and contribute to someone else's life.

## **Friendly Calls Volunteer Job Description**

Being a Friendly Caller requires little more than an interest in getting to form a new friendship with an older adult, a person with a disability or a caregiver over the phone.

Friendly Calls volunteers report to the Program Manager or another individual the agency has designated to oversee program operations. If you find that you have concerns during your participation in the program, this individual will help you address them.

### **Friendly Caller Roles and Responsibilities**

- Complete all program requirements, including reading the Friendly Calls Volunteer Manual, reviewing the training videos, submitting references and providing requested feedback.
- Conduct an introductory call with your new friend to schedule future calls. This call should last 5-10 minutes.
- Complete weekly calls for 8 weeks at a scheduled, mutually convenient time.
- Spend 20-30 minutes speaking with your new friend during each of your 8 weekly calls.
- Log each call using the tracking form provided and sent to you along with this manual.
- Adhere to the expectations listed in the Volunteer Agreement and Program Guidelines.
- Contact the Program Manager with concerns related to the program or your Friendly Call discussions.

### **Skills and Qualifications**

While there are no specific skills required to be a Friendly Caller, all volunteers must be:

- Age 18+.
- Good conversationalists, active listeners, and able to speak clearly and slowly if requested.
- Interested in meeting a new friend and open to hearing new ideas.

## Program Guidelines

As a Friendly Caller, you will make 8 weekly calls to your new friend, lasting 20-30 minutes each after the introductory call. You will be expected to adhere to the guidelines below during your conversations.

- Please share only your first name. To protect your own privacy, also avoid personal details and contact information such as your e-mail or street address.
- If your new friend wants to share personal details with you, please ask them not to do so, as it is outside the guidelines of the program.
- You may want to keep your phone number private. One way to do this is to use a web-based service that will generate a unique, free phone number for you. You also may block your number by dialing \*67 before dialing your friend's number. Please understand that many people do not answer calls from blocked numbers, so blocking your number may be problematic.
- Although the Friendly Calls initial commitment is 8 weeks, if both you and your friend would like to continue speaking after this period, you may. You will be asked about this on the feedback form that you submit toward the end of your call series. This is a choice; neither of you should feel obligated to make this additional commitment.

## Problem-Solving Guidance

While you should expect your calls will go smoothly, sometimes situations do not go according to plan. These are some challenges that may come up and ways to resolve them:

- You have tried to reach your new friend for the introductory call repeatedly and no one has picked up the phone. In this case, contact the Program Manager for assistance; it may make sense to match you with someone else.
- Your friend does not feel like speaking at your scheduled time one week. Don't read too much into this if it happens to you. Many of us



have days when we are not in the mood to talk. It is okay to ask if they would like to reschedule or to speak for just a short while. But if this happens on three or more occasions, please inform the Program Manager. This might not be the right time for your new friend to participate in Friendly Calls.

- Similarly, if the person you have been assigned changes their mind about participating in Friendly Calls right from the start, we hope you will not take this personally. Do let the Program Manager know, and if you would like, ask to be reassigned.
- Your calls are going well, but then your new friend mentions an area of concern such as a needed home repair, food, medical or personal issue. Don't take on the responsibility of resolving these issues, even if they seem minor. Your friend likely has other resources, including agencies that provide them with supportive services. Please remind your friend of this and encourage them to reach out to other individuals or organizations for help. We also encourage you to view the training video *Establishing and Maintaining Boundaries* for guidance.
- If, based on what your friend has chosen to share, you think that there is a serious issue with lack of food or unsafe housing or you suspect elder abuse, please immediately contact the Program Manager.
- Finally, if your friend seems to be experiencing a health or safety emergency during your conversation, call 911 right away and provide your friend's phone number. Afterward, it is important for you to also inform the Program Manager.

In addition, you may be surprised to learn that your new friend has a busy life with other friends and activities. There might even be a week or two when they are too busy for their Friendly Call. Please don't take this as a sign that your conversation and relationship are not important. We each have different levels of need for social connection, and you may be calling someone who longs for frequent human contact and interaction.

# Making Your Introductory Friendly Call: A Sample Script and Conversation Starters

## The Introductory Call

The introductory call is your opportunity to meet your new friend, schedule your call series and learn a little about each other. It should last 5-10 minutes. Here are some helpful tips:

- Place the call between 10:30 a.m. and 7:30 p.m.
- When calling, allow the phone to ring 10 times before hanging up. Some individuals need extra time to get to the phone.
- If the call goes to voicemail, please leave a message. In the message, state your first name, indicate you are a volunteer with the Friendly Calls Program, name the agency that provided you with their contact information and remind them that they signed up to be part of this program. Speak slowly into the phone for the length of the message to allow time for your friend to get to the phone.
- We recommend calling back a few minutes later to see if your friend is available. If there is still no answer, please try calling again on another day at a different time. Make attempts on three different dates at different times of the day.
- When you connect with your friend for the first time, restate your first name, introduce yourself as a volunteer with the Friendly Calls Program and specify the name of the local agency where you are volunteering.

## A Sample Script for the Introductory Call

Volunteer: *Hello, this is (insert name). I am a volunteer with the (insert agency name) Friendly Calls Program and I am calling for (insert name of new friend/person being called).*

Friend: *Hello, I am (insert their name).*

Volunteer: (Take note of how your new friend states their name). *It is nice to speak with you, (insert name). I understand that we are going to be talking weekly for our Friendly Calls. I also understand from (name of Program Manager at agency name) that you have signed up to be matched with a volunteer. I am the volunteer you have been matched with. This is an introductory call so that we can schedule our conversations and get to know each other a little bit. Is this a good time for us to do that?*

Friend: *Yes, it is a good time now, but normally, I am not free now. Usually, this is when I have my book group, but we canceled this week.*

Volunteer: *I am glad I was able to reach you and would like to set up our 8 weekly calls at a time that works for you. What is a good day and time for our regular calls?*

Friend: *Usually, Tuesday mornings are good. Thursday late afternoon is good too.*

Volunteer: *Okay, so let's have our regular calls at 4 p.m. on Thursdays. Would that work for you?*

Friend: *Yes, that is good.*

Volunteer: *Great, we will plan on talking for the next 8 Thursdays at 4 p.m. Before we end our call, it would be nice for us to get to know each other a little bit. You mentioned you are in a book group. What are you reading?*

Friend: *We are reading that new novel by Jane Smith. Have you read it?*

Volunteer: *I haven't. What is it about? Would you recommend it?*

The friend shares a bit about the book.

Volunteer: *That sounds like quite a story. What are some of your other interests besides reading?*

Friend: *I also like to take walks and bake bread.*

Volunteer: *I am a baker too. I would love to swap recipes during our call later this week.*

Friend: *That sounds fine.*

Volunteer: *I have really enjoyed our short chat. I am looking forward to talking to you on Thursday, (insert date), at 4:00. Do you want to write down the time we scheduled? I am going to. (Give the friend time to write down the call time.)*

Friend: *Yes, next Thursday.*

Volunteer: *I will call you then. Goodbye.*

Friend: *Goodbye.*

### Conversation Starters

Please feel free to use the conversation starters listed below. There are additional suggestions in other sections of this manual and in the training video *Building a Relationship through Engaging Phone Conversations*. Once you get more comfortable, you will both surely identify many other topics to discuss.

- Share something you believe you have in common. You can begin with the Friendly Calls Program. Talk about how you initially heard about the program or why you thought to get involved.
- Ask about the community where they live and share information about your own hometown.
- Find out about your new friend's hobbies – perhaps they have a favorite TV show or sport or want to discuss a book they recently read.

## Building a Relationship through Engaging Phone Conversations

You have made it through your introductory call. Now what? How do you develop a friendship with a stranger over the phone? It has been done before, and you can do it too by creating a positive environment for your calls, guiding the conversation to meaningful and appropriate topics, and being a thoughtful and active listener and conversation partner.

### Setting the Stage for Your Friendly Calls

Show respect for your new friend and their time by:

- Making your Friendly Calls from a distraction-free and quiet place.
- Avoiding multitasking and, if possible, disabling notifications on your phone, computer, etc.
- Setting and sticking to a weekly schedule for your conversations. If you are not able to call at your scheduled time one week, ask your friend if rescheduling is possible (though don't assume that it will be.)

We ask you to avoid extending calls beyond 30 minutes, as we have found that this allows for full engagement throughout the call. However, if you and your friend both would like to have slightly longer calls, discuss this with each other and agree on the preferred length. Clarity and predictability are important to building your relationship.

### Discussing Meaningful and Appropriate Topics

It is possible to have an engaging and deep conversation while avoiding hot-button topics like politics and religion. You will also want to steer clear of discussions about health conditions, finances, legal matters and family dynamics. Aside from the weather, there's still much to talk about and enjoy. Please read on and review the training video *Building a Relationship through Engaging Phone Conversations* for our suggestions.

Earlier in this document, we mentioned a few conversation starters to use during the introductory and subsequent calls. Others include asking about hobbies, interests, travel, favorite books, movies, TV shows, music and art. As you get to know each other, you might want to discuss favorite childhood memories, holiday traditions, life lessons they might share or their favorite part of the day. We suggest these topics because they are open-ended and may lead to unexpected discoveries about your new friend.

### **Active Listening**

You may find that it can take some time to draw out your new friend and find common ground. We encourage you to be patient, ask thoughtful questions and share information about yourself to build a trusting bond.

Once your friend is comfortable sharing more, you can use conversational cues to show you are listening. For example, during a lengthy story, offer reinforcing phrases like “oh, yes” and “I see.” And allow time for pauses before jumping in to share your own insights and responses.

Another tip is to build on prior conversations and circle back to people, places and things your friend has mentioned. This shows you are invested in the relationship and helps create a collective set of reference points.

Finally, it is okay to end a conversation when you come to a natural stopping point, even if that happens before the 20-30 minutes recommended for each call. It is better to end a bit early than to introduce a new and potentially weighty subject that could lead to a lengthy extension of your call. If there is something new you are looking forward to discussing, write a note for yourself so that you can bring it up early on in your call the following week!

### **Ending Each Call**

When you have come to the end of the call, let your friend know you have enjoyed the conversation (if you have), as this will help your relationship grow. Also, restate the time when you will call your friend next, as this is a good reminder and reinforces that there is a structure to the program.

## **Establishing and Maintaining Boundaries**

Every successful relationship has a set of boundaries, and your Friendly Calls pairing is no different. Boundaries are clear limits and rules that we define for ourselves within relationships that guide how close we let others get.

Throughout your Friendly Calls relationship, it will be important to determine boundaries that are comfortable for you and your friend and to be consistent with the goals of the program. Clear boundaries will help you and your friend know what you can expect from each other and will help you make the most of your time together.

### **What Do Friendly Calls Boundaries Look Like?**

Friendly Calls boundaries are defined in previous sections of this manual. They include the rules we have given you about the program structure and the limits we have defined with respect to information sharing. Here are some examples:

- Make 8 weekly 20- to 30-minute calls.
- Set and stick to a schedule for these calls.
- Avoid conversations about sensitive topics.

By adhering to the guidelines that we have identified, you are setting and reinforcing boundaries about the parameters and tone of your relationship. You are also respecting each other's privacy.

### **How to Set Boundaries for Yourself**

Your first couple of weekly Friendly Calls will form the foundation of your friendship and establish a pattern and rhythm for your interactions. It is important to clarify expectations from the start by being attentive to, and respectfully addressing deviations from, what you understand to be the program norms.

If your new friend makes a comment that raises a concern for you, be it asking for an additional call each week or bringing up topics of conversation that you do not believe are appropriate, you need to respond kindly and directly.

We recommend that you start by asking your friend to restate and, if needed, clarify the request or comment so that you are sure that you understood it. Then, decide on your response.

If you are not comfortable with the request or it's outside the Friendly Calls guidelines, feel free to steer the conversation back into familiar territory or to let your friend know that you cannot honor a request that is beyond the scope of the Friendly Calls Program. Maintaining boundaries can be tricky in any relationship. We encourage you to review the training video *Establishing and Maintaining Boundaries* before beginning your calls to gain more information about this topic.

### Closure

Near the end of your call series, you also will want to make sure that you and your friend have the same expectation about whether to continue calls beyond 8 weeks. We suggest bringing up this topic during your 6th call. At that time, you can mention the number of calls remaining in the series. If you would like to continue speaking, you should let them know and see whether they are interested in this too. If you don't want to continue speaking with your friend after your 8-week commitment, you can let them know that there are 2 calls remaining in the series, to begin the process of closure, and then provide another reminder during week 7. During your 8th call, remember to say goodbye and let your friend know how much the relationship has meant to you.