
The New York State Friendly Calls Program

Provider Manual



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.



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.

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An Overview of the Provider Manual

The Friendly Calls Provider Manual (this document), which describes the rationale for the program, participant and volunteer recruitment, participant and volunteer onboarding, and participant and volunteer support.

The Friendly Calls Volunteer Manual, which explains the importance of the program, volunteer roles and responsibilities, program guidelines, steps for making the introductory call, relationship building, and maintaining boundaries.

Training Videos for volunteers, which elaborate on the information provided in the manuals. The training videos cover the following topics: *What Is Social Isolation, Making a Connection through Effective Communication, Building a Relationship through Engaging Phone Conversations and Establishing and Maintaining Boundaries.*

Forms for Participating Older Adults, Individuals with Disabilities and Caregivers:

- Participant Intake Questionnaire
- Program Guidelines for Participants
- Participant Agreement
- Participant Feedback Forms for Initial and Additional Call Series (two separate forms)

Forms for Volunteers:

- Volunteer Application Questions
- Volunteer Reference Form
- Volunteer Agreement
- Volunteer Call Log
- Volunteer Feedback Form for Initial and Additional Call Series (same form)

The use of these materials will be discussed throughout this manual.

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 project 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 (NYSOFA) 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 a Friendly Calls Program in their locality.

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. Even before the COVID-19 pandemic, social isolation was a serious public health concern. "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).

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 an activity like Friendly Calls, where volunteers reach out to older adults, individuals with disabilities and caregivers and provide social interaction that can broaden their horizons and expand their connections. Friendly Calls volunteers provide dependable and caring conversation and make a positive contribution to someone else's well-being.

Participant and Volunteer Onboarding

What type of individual will be successful in the Friendly Calls Program? How do you find participants and volunteers? What type of information should you collect to ensure that everyone involved follows the program guidelines? These are just some of the questions that the participant and volunteer onboarding processes will address.

Here is a summary of the participant onboarding process:

- **Step 1:** Identify and recruit older adults, individuals with disabilities and caregivers who may want to participate.
- **Step 2:** Complete intake with each prospective participant.
- **Step 3:** Send each participant the Guidelines and the Agreement; review and securely store intake data and signed agreements that are returned.
- **Step 4:** Accept eligible and appropriate participants into the program.
- **Step 5:** Pair participants with volunteers.

Here is a summary of the volunteer onboarding process:

- **Step 1:** Identify and recruit prospective volunteers.
- **Step 2:** Send volunteers all orientation materials and forms.
- **Step 3:** Review volunteer submissions and securely store intake data and agreements that are returned.
- **Step 4:** Pair participants and volunteers.
- **Step 5:** Accept volunteers into the program and share their participant match information.

The remainder of this manual describes each of these steps.

Explaining the Friendly Calls Program

You have already learned about how the Friendly Calls Program can promote social connectedness. Below are some suggestions for explaining the program to those who want to learn more. This messaging will be helpful in developing your community's outreach language and in your screening and onboarding communication with both participants and volunteers.

Program Snapshot

Friendly Calls participants include older adults, individuals with disabilities and caregivers. Each participant signs up to receive weekly 20-to-30-minute calls from a volunteer for 8 weeks. Volunteers will be ages 18+. Participants and volunteers are screened for appropriateness before being matched. At the end of the 8-week series, the participant and volunteer are asked for feedback and given the option to continue speaking for an additional 8-weeks. Further continuation is also possible.

Each agency offering Friendly Calls will designate a staff member or experienced volunteer to take responsibility for organizing and administering the program. Throughout the manual, this individual is referred to as the "Program Manager."

Explaining the Program to Prospective Participants

Friendly Calls is a good fit for older adults, individuals with disabilities and caregivers interested in regular social conversation with a caring volunteer. It is important to ensure that all participants understand that the purpose of the program is socialization and friendship, not social work support, and that they are able to make the time commitment. Reasons to participate in the Friendly Calls Program include:

- An interest in meeting new people.
- A desire to share and reflect on stories and life lessons.
- A need or preference for activities and social opportunities that can take place from home.

Some participants may wonder whether the program is right for them if they are not naturally outgoing or accustomed to meeting people outside their normal circles. They may be reassured to learn that volunteers are provided with conversation starters and encouraged to ask questions and explore common interests. It may also be helpful to remind them that they have time in between calls to think about what they may be eager to learn or share next.

Explaining the Program to Volunteers

Friendly Calls volunteers will be ages 18+ and may live within or outside your community. Volunteers should be interested in having social conversations with someone outside their network, able to make time for training and their regular calls, and agree to guidelines around confidentiality and boundaries. These requirements are explained in the volunteer job description. Reasons volunteers join the Friendly Calls Program include:

- A desire to give back to the community and/or help another person.
- A positive relationship with an older adult or person with a disability in their past.
- Interest in a volunteer role with a time commitment that is manageable and flexible.
- They're in the middle of a life transition and looking for new ways to spend their time.
- A career-related interest in aging, social work or a related field
- An interest in meeting new people.

Volunteers may assume that the most important quality in a successful Friendly Caller is the ability to initiate and drive conversation. However, that is not necessarily the case. Relationship building is about reciprocity and connection. Most important are compassionate listening skills and follow-through on the weekly commitment, as these will ensure their new friend feels acknowledged and valued.

Advice and Materials for Recruiting Participants and Volunteers

You may already be experienced with community outreach and have a vision for where and how you will identify participants and volunteers for this program. That's wonderful! But if not, that's okay too. This section offers tips and tools to help.

Marketing Materials

First, you will develop branded materials that you can use in a variety of situations. You may find it worthwhile to segment your audience for these materials into participant vs. volunteer, especially if you have a greater need for one than the other. But sometimes, it might make sense to promote the program to both audiences jointly. Materials that you will want to have on hand include:

- A program flyer
- Copy for a radio public service announcement
- A social media blurb
- An outreach e-mail
- A description for an online posting or newsletter

Photos are useful for written and digital materials so that prospective participants and volunteers can envision themselves taking part. Participants and volunteers from some of your existing programs may be willing to help by taking photos of themselves on their phone that you can then use to promote Friendly Calls.

Sample Recruitment Plan

Next, create a recruitment outline or short plan to organize your effort. An abbreviated example might look something like the table on the following page.

Sample Recruitment Objectives:

- Identify and train participants and volunteers to start a Friendly Calls Program with 10 calling pairs in May.
- Focus on older adults and volunteers ages 18+ who have not been involved with your agency.

Target Audience	Message	Timing	Outreach Channels
Older adults new to the agency	Share wisdom and friendship with a volunteer	March	Examples: <ul style="list-style-type: none"> • Libraries • Local clinics • Faith-based institutions
Volunteers ages 18+ new to the agency	Bring joy and friendship to an older community member	March	Examples: <ul style="list-style-type: none"> • Community volunteer groups (Rotary, etc.) • Campus community service programs • Faith-based institutions • Corporate groups

It’s essential to start with reasonable objectives, such as 10 or 25 pairs of callers, rather than trying to take on too many pairs at the outset. This will allow you to see what issues emerge and how to tailor your recruitment and messaging in the future. You also will want to leave enough time for participants and volunteers to complete program forms and other requirements in advance of their introductory calls.

Outreach Channels for Participants

Many of your participants may be referred from NY Connects. You also will want to publicize the program among those who are already receiving your services or are on your agency’s mailing list. This may generate sufficient participation. If it does not or if you are hoping to interest new older adults, individuals with disabilities and caregivers in the program, on the next page, there is a list of possibilities to explore.

- Local senior centers
- Case management agencies
- Senior housing communities
- Libraries
- Pharmacies
- Faith-based institutions
- Local health centers and/or medical offices, especially providers who may have patients meeting your specific program criteria
- Those in your programs already who may know of friends and neighbors who might want to participate
- Local and state elected officials' offices
- Local newspapers, radio stations and community news sites

You could also promote the program at community meetings, such as your long-term care council or a community board.

Outreach Channels for Volunteers

Many of the outreach channels that you will use to recruit participants can also be useful to identify volunteers. Make sure that you are being clear about what you are looking for when you recruit.

Additionally, look to the following when you are focusing on volunteer recruitment:

- National volunteer websites, such as Volunteer Match or local options such as Volunteer New York (Westchester) and Long Island Cares
- Community groups, such as Rotaries and Junior Leagues

- College groups, including fraternities and sororities, service clubs and alumni associations
- Corporate volunteer groups through United Way if your community has one
- Branches of regional and national banks as well as large local companies that involve employees in community service activities
- Other nonprofits that use volunteers in different roles and may want to partner with you to offer varied volunteer options

Sample Messaging

Messaging should be compelling and succinct.

Here is messaging you can use when you are pitching the Friendly Calls Program to **prospective participants**:

Sign up for the Friendly Calls Program. Connect with a volunteer to socialize and chat about common interests. Volunteers are eager to spend time with you. By joining, you may start a new friendship with someone in your community.

In Friendly Calls, you will be matched with a volunteer who will call you weekly for 8 weeks at a time that works for you. Each weekly call will last 20-30 minutes. And if you and the volunteer hit it off, you are encouraged to extend your match after the 8-week session.

For more information, (insert here).

Here is messaging you can use in flyers, outreach e-mails and online postings for **prospective volunteers**:

Sign up for Friendly Calls to volunteer by phone. Develop a meaningful friendship with an older adult, a person with a disability or a caregiver in need of social connections. If you are interested in a short-term commitment with a big impact, this is the volunteer program for you!

Friendly Calls is an 8-week program. You will be matched with a participant whom you will call each week at a mutually convenient time. Each weekly call lasts 20-30 minutes. And while there is no obligation to do so, if you and the participant hit it off, and you have the time, you may extend your match.

For more information, (insert here).

Screening and Onboarding Participants

Your process for screening participants will help you determine who is a good fit to receive Friendly Calls from volunteers. The goal is to assess whether the prospective participant can maintain their end of a short, informational conversation and follow through in providing required information to you.

The Intake Call

Intake calls with individuals already known to your agency may be brief, as you will likely already be aware if they are good candidates for Friendly Calls. During these conversations, you will review the Participant Intake Questionnaire to update contact details and learn why they are interested in the program. You will also describe the program requirements and structure by reviewing the Participant Guidelines and the Participant Agreement.

You will likely spend a bit more time on each intake call with a prospective participant who has had little or no previous involvement with your agency. In addition to completing the Participant Intake Questionnaire and reviewing the Participant Guidelines and the Participant Agreement, you may ask a few questions to get to know the participant or complete other agency forms. During these conversations, you will want to determine whether you are speaking with someone who can follow the flow of your questions and respond appropriately. You will also be able to determine whether they understand the program structure and guidelines you are explaining. If a new client is able to engage appropriately during the intake call, they will also be likely to have a good experience speaking with a Friendly Calls volunteer.

During the intake call, you may speak with individuals you do not see as a good fit for the Friendly Calls Program. In these instances, you should explain this during the intake conversation and, if possible, refer these individuals to other social services.

Participant Guidelines and Participant Agreement

After your intake call, the next step in onboarding participants is to send hard copies of the Participant Guidelines and the Participant Agreement by mail. Send one copy of the Participant Guidelines for the participant to keep. Send

two copies of the Participant Agreement - one for the participant to keep and one to be signed and returned to you. Please include a stamped envelope addressed to your agency for this purpose, along with clear instructions. If the individual uses e-mail, you can send the information this way, but make sure to request a signed agreement be returned to you by mail or e-mail.

Collecting and Storing Participant Information

You will want to store forms and/or the information that they contain in a secure location. What this looks like will depend on your agency and systems and may range from a locked filing cabinet to a database or spreadsheet with password protection. The more you can rely on online tools, the easier it will be to administer the program, analyze participant data and create call pairings.

Communicating with Participants

If you will be able to pair the participant with a volunteer within one to two weeks after receiving their signed agreement, then there is no need to communicate with the participant about their status immediately after receiving their signed agreement. However, if you have many more participants than volunteers, it is helpful to let the participant know they have been accepted into the program and the approximate wait time before they'll receive their volunteer match.

Screening and Onboarding Volunteers

Your screening process for volunteers will confirm the volunteer's interest in the program and understanding of and commitment to the guidelines.

Volunteer Intake

It is assumed that much of your communication with volunteers will take place using e-mail. When prospective volunteers inquire about Friendly Calls, you can respond by providing all the materials designed for them, along with a breakdown of the next steps. This includes sending the Volunteer Manual, the necessary forms and links to the training videos. This will streamline your communication and give the volunteer a clear idea of what to expect should they decide to move forward.

If you have the capacity to do so, you may want to offer short, monthly online information sessions to explain the program to prospective volunteers, provide an overview of the application process and answer questions. During these sessions, you could pose a couple of questions to the volunteers to help gauge their responsiveness.

In your communication with volunteers (be it via e-mail, information session or phone), direct them to review the information in the Volunteer Manual, especially the volunteer job description, program guidelines and training videos. If they are interested in applying, they should complete the Volunteer Application and Agreement and send the Volunteer Reference Form to two nonfamily references to complete on their behalf. Volunteers who are not in school or the workforce can submit recommendations from staff at other agencies where they have volunteered or from longtime friends.

We suggest that you use an online survey or digital form so that you can send volunteers links to the application and reference forms. Paper forms and electronic documents also work if your agency does not have other tools available or if you believe online forms might prove challenging for many of your volunteers.

The Volunteer Application requests an upload/photocopy of a U.S. government-issued photo ID, which is best practice when you are introducing

a volunteer to one of your clients in an unsupervised situation. Because the ID and other information you collect are confidential, your data collection and storage methods should be secure - whether this is a locked filing cabinet, a database or password protected spreadsheet.

Additional Volunteer Screening Options

Although the Friendly Calls Program incorporates screening measures and comprehensive training for volunteers that are considered sufficient given the telephonic nature of the program, there are additional measures you can implement to better get to know volunteers and their backgrounds. The two most common are interviews and criminal background checks.

Volunteer interviews can be completed by phone, by video chat or in person if your volunteers are nearby. An interview can provide additional insight into the volunteer's motivation for signing up for Friendly Calls, experience with the types of participants they might meet in the program, ability to follow through on a commitment, conversational style and maturity. You also could conduct small group interviews, which can double as information sessions about the program. If you have the capacity to conduct some type of interview or information session, it will be worth your time.

Criminal background checks are also popular tools for screening volunteers. They are typically used for in-person volunteering where volunteers are left unsupervised with vulnerable individuals or might have access to confidential information about these individuals. Background checks are conducted by outside agencies and include a review of the volunteer's federal, national and county criminal records. The checks are limited to the past seven years and, in New York State, can be expensive.

A possible alternative to a background check is to ask volunteers whether, since reaching the age of 18, they have been convicted of a criminal offense. This question would come at the end of the volunteer screening process. If a prospective volunteer answers "yes" to this question, you will want to speak with them. A "yes" response may or may not disqualify a prospective volunteer from the program. This determination should be based on applicable laws and your agency's volunteer policies. If you learn information that precludes the volunteer from participating, let them know. There is guidance about this topic below.

Reviewing and Accepting Applicants

You will want to review the following documents for each volunteer to determine whether to accept them into the Friendly Calls Program:

1. Volunteer Application - all required questions should be completed.
2. Volunteer identification - make sure this is valid and meets requirements.
3. Two nonfamily references.
4. Volunteer Agreement.

If you are missing any of this information, you should reach out to the prospective volunteer, as this impacts your ability to move forward with their application process.

The volunteer's application responses will describe their motivation for participating in Friendly Calls. The references should provide information about the volunteer's dependability and communication skills. If these documents are completed and the responses are acceptable, then pending other screening you might elect to complete, you will want to officially "clear" the volunteer for participation in the program and document this step in your program files.

Communicating with Volunteers

If you are able to pair the volunteer with a participant within one to two weeks after receiving their application and other information, then there is no need to communicate with the volunteer about their status immediately. However, if you have many more volunteers than participants, it is helpful to let the volunteer know that they have been accepted into the program and share the approximate wait time for their match.

Rejecting Applicants

From time to time, you will meet a prospective volunteer who does not qualify for the program. Reasons that might exclude a volunteer would be refusal to provide the required information, answers to application questions that indicate a lack of understanding of the program and its purposes, or poor references. If you choose to conduct background checks or ask about criminal history, you might also get information that would prohibit applicants from volunteering. In these instances, let the volunteer know that they will not be able to join Friendly Calls. It is best to do this via phone, then follow up with a short letter. While you will want to document the rationale for rejecting applicants in your confidential record-keeping system, you do not need to and should not provide specific reasons for your decision to the volunteer applicant.

Following is sample language for this call and letter:

Thank you for your interest in becoming a Friendly Calls volunteer. Unfortunately, we feel it is not the right fit and cannot offer you a placement in the (insert name of agency) volunteer force.

Pairing Participants with Volunteers

You will want to develop a system for pairing participants and volunteers. To set up the best system for your agency, think about the number of participants and volunteers that your program is likely to accommodate in the long term, as well as your staffing and technological capacity. Key considerations are described below.

Pairing Frequency

The level of interest in the program at your agency will influence how and how often you make call pairings. Ideally, your participant and volunteer numbers will be balanced so that once the participant has completed intake and signed the Participant Agreement and a volunteer is cleared, they will wait two weeks (or less) for their pairing. If you are having difficulty maintaining even numbers of participants and volunteers (which may be the case more often than you would like), you should consider a more active recruitment strategy, as described in the “Program Promotion” section of this manual, or reach out to existing or former participants and volunteers to see whether any might be interested in additional call series.

If you are forming a handful of pairs each month, you may want to operate on a first-come-first-served basis, which means you match participants and volunteers in the order in which they are cleared. An exception could be a situation where a participant’s primary language is not English, as you will have to identify a volunteer with the requisite language skills to make the pairing a success. If interest levels in your community are high, you will want to create a schedule for forming pairings (e.g., every other Monday).

Accommodating Requests

Some Friendly Calls participants delight in the idea of speaking with a stranger whom they know nothing about. Others appreciate a little predictability and familiarity. Here are several types of requests that you may decide to accommodate:

- Gender: Some participants express increased comfort in talking to a volunteer of the same gender.

- Age: Some participants may enjoy an intergenerational connection, while others would prefer speaking with someone who is perceived as a peer.
- Geographic location: Some participants want to talk with a volunteer who knows their community well as a way of having common references.
- Common hobbies and interests.

Note: While it is nice to fulfill requests that are meaningful to participants, Friendly Calls pairings will typically be successful even if you do not account for any of these factors. One of the most important keys to success is timing. Pairings should be made soon after each participant and volunteer are cleared, as that is when both parties are most eager to get involved, the training is top of mind for volunteers and there is a strong mutual interest in developing a successful phone friendship.

Assignments

Once you have paired participants and volunteers, you will contact the volunteers so they know whom to call. You will send an assignment e-mail or other communication with the following information. Here is a sample that you can use:

Dear (insert name of volunteer),

Thank you for signing up for Friendly Calls. We are pleased to let you know that we have identified a match for you. Please call:

Insert first name, last initial

Insert all phone numbers

It is important that you track the dates and times of your call using the attached Call Log and that you share your experience in the program using the attached Feedback Form. (These forms should be attached.)

We ask that you make your first attempt to reach your new friend for the introductory call in the next three days (between 10:30 a.m. and 7:30 p.m.) and that if you are not successful, you try two additional times on other days

this week. If you are still not able to get in touch after these attempts, please let me know. My contact information is below.

If you need any additional suggestions for discussion topics or other guidance for the calls, please refer to the Volunteer Manual and training videos (available on our website - include a link or attach, even though the volunteer should already have the materials).

Thank you for your participation in Friendly Calls.

Sincerely,

Insert Program Manager Name and Contact Information

We also suggest that you get in touch with the participants to let them know that you have matched them with a volunteer if they have been waiting more than two weeks. This can be a phone message to indicate that they have been matched with a volunteer who will call within the next week. The call will serve as a reminder that they signed up for the program and that they should expect a call from an unfamiliar number.

Tracking Pairs

In addition to maintaining digital or hard-copy records with contact and other information about each participant and volunteer, you also will want a system to keep track of each Friendly Calls pairing. This system might be a database, a spreadsheet or specialized volunteer management software (if your agency already has this resource). Whatever method you choose, it's important to document the following elements for each pairing:

- Participant first name, last name and contact information (phone, e-mail, address).
- Volunteer first name, last name and contact information (phone, e-mail, address).
- Pairing start date.
- Date to send a Feedback Form/reminder for the current call series. (See "Collecting Participant and Volunteer Feedback.")

- Dates of each Feedback Form submission.
- Anticipated end date for current call series. (This will be eight weeks after the pairing start date for new pairs or later for those pairs continuing beyond eight weeks.)
- Actual end date (for those pairs that don't continue).
- Call dates. (See "Collecting Participant and Volunteer Feedback.")
- Volunteer wishes to continue pairing (yes plus date or no). (Whenever a pairing continues for an additional 8-week series, you will also want to update the feedback and end dates.)
- Participant wishes to continue (yes plus date or no). (Whenever a pairing continues for an additional 8-week series, you will also want to update the feedback and end dates.)
- Notes with dates about any important details on the pairing or other feedback.

Collecting Participant and Volunteer Feedback

The Friendly Calls materials include a Participant Feedback Form, Volunteer Call Log and Volunteer Feedback Form. Below is information on the type of information you will be collecting through each form and how you will want to use it to advance the success of your Friendly Calls Program.

Participant Feedback Forms

There are two separate forms for participants to use to record their experience with Friendly Calls:

- 1) Participant Feedback Form, Initial Call Series: This is to be sent to participants to complete at the end of their initial 8-week pairing with a volunteer.
- 2) Participant Feedback Form, Additional Call Series: This is to be sent to participants to complete at the end of any subsequent 8-week call series with the same volunteer. If the participant speaks with a second volunteer, that is treated as a new pairing and the Initial Call Series form should be used.

The reason two separate forms were created for participants was to reduce possible confusion for those who might think they were mistakenly receiving a form they already completed when the call series continues.

These forms ask participants to describe their experience in the program, which will help you learn how the program is going and about successes and possible areas for improvement. Participants are also asked whether the volunteer has mentioned anything of concern. This might be a way for participants to identify volunteers in need of assistance (as we understand that some volunteers might be older individuals themselves). Finally, the form asks participants about continuing in the program. The hope, of course, is that participant and volunteer responses to this question will match. If they do not, you will want to intervene, as already discussed.

It is assumed that these forms will need to be sent via mail to program participants. If they are sent by regular mail, it is helpful to include a stamped, addressed envelope.

Volunteer Call Log

The Volunteer Call Log is a form that volunteers should use to track the dates and length of their Friendly Calls. We recommend that this be provided to each volunteer as a paper or electronic document when they are first paired with a Friendly Calls participant. The volunteer should keep track of this form and use it to record information about each call just after it has taken place. The volunteer should send the completed log to you at the end of the 8-week call series. Note that the Call Log has space to indicate whether the volunteer is reporting on the first, second or other call series. Volunteers should be asked to log each call, using a new log for each 8-week series, even if they are on to their fourth or fifth continuation with the same participant. You will want this information to verify that the pair is still active and to tabulate volunteer hours and participation levels. It is important to know whether volunteers are continuing to stay in touch with participants and to ensure that they are following program guidelines.

Volunteer Feedback Form

The Volunteer Feedback Form should be used to provide feedback on the initial and any subsequent 8-week Friendly Calls series. It is helpful for the volunteers to receive this form at the outset of their involvement with the program and then again via e-mail at the beginning of week 7 in each call series. This will serve as a helpful reminder to the volunteer to either discuss continuation or gain closure on the relationship. When you send this reminder, remember to include a deadline for completion.

The Volunteer Feedback Form asks volunteers whether they would like to continue their Friendly Calls pairing following the end of the 8-week series or whether they would like to be paired with a different participant. You will want to record this information in the program tracking system and compare it to the information that the participant provides. If the participant and volunteer provide different responses to this question, you will need to be in touch with each of them to clarify, and you will likely need to offer assistance in ending the pairing.

Additionally, the Volunteer Feedback Form asks about the volunteer's experience in the program and has room for the volunteer to provide comments. These comments can help you collect qualitative data to share with the NYSOFA and may also provide insights to help you tweak certain aspects of the program.

Inevitably, there will be volunteers who do not complete the Feedback Forms as requested. In addition to sending an additional reminder via e-mail, you may need to call those volunteers who never respond. This can be labor-intensive, so you might want to identify an experienced office volunteer or intern who can help.

Protocols and Sample Letters for Removing Inappropriate Participants and Volunteers

The Friendly Calls Program establishes clear guidelines for participants and volunteers around information sharing, call frequency and length, and discussion topics. There may be occasions when participants and volunteers do not adhere to all rules. Sometimes, the situation will be clear-cut. Hate speech and harassment are unacceptable and are grounds for immediate removal.

Other instances may be less obvious and warrant additional investigation and a warning system. Here are several examples you may encounter as well as suggested responses:

Example 1

A volunteer informs you that their new friend has no food at home and needs assistance to get meals delivered. They know this because the friend shared the information during a call and the volunteer went over to the friend's home with groceries and confirmed the need.

Response: The volunteer and participant have broken Friendly Calls rules, with the most significant concern being direct contact. While it might be tempting to remove them from the program, they will likely continue to see each other - but without your support and oversight. It would therefore be better to speak with them about their behavior, discuss other options for addressing this situation in the future, connect the participant with a resource to address their food insecurity and remind them about the program's guidelines. It also might be helpful to transition them to an in-person, friendly visiting relationship (which should involve more supervision and a background check of the volunteer) if your agency offers this type of program.

Example 2

A volunteer complains to you because their friend has made several calls to them in the past week outside their scheduled time.

Response: There are several ways to address this situation, including reminding the participant of the program's structure, the call schedule and the agreement they signed. The volunteer should also be encouraged to take another look at the training video on *Establishing and Maintaining Boundaries*, which provides some additional guidance on how to set clear expectations. This type of situation can also be prevented when volunteers use call-blocking services.

Example 3

A participant contacts you because they are uncomfortable with some of the volunteer's questions and not enjoying their time with the volunteer.

Response: You will want to learn more from the participant about what is being asked. Are the questions problematic because they cover inappropriate topics? If so, you will need to speak with the volunteer and assess their reaction to this feedback and whether they have the ability and desire to limit the conversation to appropriate subject matter. The volunteer should also be encouraged to take another look at the training video on *Establishing and Maintaining Boundaries*, which provides guidance on appropriate and neutral topics of conversation. If the topics are highly inappropriate, you should end the Friendly Calls pairing and rematch the participant. The volunteer should not continue in the program.

On the other hand, you might learn that the questions cover neutral topics but touch on issues that this participant prefers not to discuss (even though another participant might enjoy them). In this case, you might want to consider rematching both the participant and the volunteer with other people.

After exploring the unique situations that are brought to your attention, you will want to provide a verbal warning for issues you find problematic and follow up with a warning letter to the participant, volunteer or both - depending on the situation.

Here is sample language for the warning letter:

Thank you for speaking with me earlier today about your experience in the Friendly Calls Program. I appreciate the information that you provided. As we discussed, this behavior (it's best to specify what it is) is not permitted in

the program. If this happens again, we will need to conclude your participant/volunteer engagement.

If the situation continues or you have grounds for immediate removal, you will want to call the participant/volunteer to inform them about their removal from the program. You will also want to follow up with a letter.

Here is sample language for a participant removal letter:

I understand that you have not adhered to the Participant Agreement that you signed when joining the Friendly Calls Program. You have already received a written warning about this behavior (it's best to specify what it is), yet it has continued. As a result, your involvement in the program has been concluded. You will not be receiving any additional calls from the volunteer. We will be contacting them on your behalf to let them know that you have withdrawn from the program.

Here is sample language for a volunteer removal letter:

I understand that you have not adhered to the Volunteer Agreement that you signed when joining the Friendly Calls Program. You have already received a written warning about this behavior (it's best to specify what it is), yet it has continued. As a result, your involvement in the program has been concluded. Please do not continue to call your friend. We will be contacting them on your behalf to let them know that you have withdrawn from the program.

Concluding Note

Friendly Calls will be a rewarding experience for all involved. We thank you for your interest in this program model and the role that you will play in promoting social connections among older adults, individuals with disabilities, caregivers and volunteers in your community.