

River Valley Regional Commission Area Agency on Aging

Heart to Heart (H<sub>2</sub>H)

(A Telephone Reassurance Formula)



Implementing a Telephone Reassurance Program in Your Area Agency on Aging

Submitted By

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## **Purpose of Manual**

The purpose of this manual is to establish guidelines and requirements for the River Valley Area Agency's Telephone Reassurance Program, hereinafter to be referred to as Heart to Heart. This manual may also serve as a guide to the twelve Georgia Area Agencies on Aging in implementing a telephone support program.

## **Program Inception**

Heart to Heart is a telephone reassurance program developed by the River Valley Area Agency on Aging in 2010. It was launched as an outreach program to support at-risk seniors over 60, persons with disabilities, who typically live alone, are homebound, and/or have little or no caregiver support. Caregivers and clients who have been diagnosed with Dementia are also targeted. Clients benefit from this program through one on one communication with another caring individual. Brief phone calls are made Monday – Friday, not only addressing physical needs, but emotional needs as well. This is vital because social isolation is huge among our senior population. Other benefits include sharing of information, promoting safety, and providing a sense of assurance to our clients.

In order to give our more functional and independent seniors a sense of being needed, we have included them as part of our volunteer program. In order to retain and reduce the commitment time of volunteers, volunteer /recipient ratio is usually 1: 3. This varies depending on the availability and commitment of volunteers. The program was piloted in Muscogee County, and is now active in 8 counties. Currently there are 65 participants with plans to add 15 participants during FY 2015. Both volunteers and recipients report being satisfied with the program. It is our goal to be able to increase the number of volunteer support in the communities, thereby enabling us to reach more seniors. During FY2015, River Valley Area Agency has plans to expand the program into 2 additional rural counties.

## **Goals of the Program**

- Promote safety for HCBS clients by identifying emergency situations and providing a telephone security check for frail and vulnerable clients.
- Decrease social isolation and loneliness by providing telephone contact with trained peer support volunteers.
- Share resource information with HCBS clients by providing peer support volunteers with resource manuals.
- Provide sense of well-being by monitoring clients through peer support telephone calls.

## **Implementation**

A staff member will be designated as the Program Coordinator. The Program Coordinator, along with any other designated staff available, will create administrative forms, record keeping procedures, and will be responsible for recruiting volunteers and participants. This staff member must be familiar with client waiting lists and interpretation of DON-R scores. The Program Coordinator is responsible for monitoring all aspects of the program

## **Volunteer Recruitment**

The Program Coordinator is responsible for recruiting volunteers. Because volunteers are recruited primarily from the HCBS waiting lists, it is important that the Program Coordinator be familiar with client records. Volunteers are primarily clients who are more functional and have low DON-R scores, usually 10 and below. In some instances, clients with higher DON can be utilized. Volunteers must have a phone that is in service. Logistics are important (area codes/long distance). When recruiting volunteers, pay close attention to how they converse on the telephone. Since volunteers are the heartbeat of the program, establishing a rapport with volunteers is of the utmost importance. When recruiting volunteers, be sure to consider persons with disabilities.

## **Volunteer Training**

All volunteers receive a volunteer packet which includes a letter thanking them for their willingness to call participants, calling instructions, and a profile of the participants. All volunteers must be willing to sign a statement of confidentiality as well as a participation agreement. A copy of the AAA privacy notice and a copy of the Telephone Reassurance Privacy Rules must be given. It is important that volunteers understand that they are functioning as such and that their participation does not, nor will it ever interfere with their status as an AAA client. Volunteers must understand, and it must be stated in the participation agreement, that there is no compensation— monetary or otherwise, for program participation. Volunteers do not have physical contact with participants.

### **Volunteers are trained in the following areas:**

- Goals of Program
- Volunteer Role/Expectations
- Confidentiality
- Conducting Phone Calls
- Peer Support Questions
- Resource Information
- Boundaries
- Documentation- Client records and reporting forms
- Reporting Methods
- Telephone Etiquette
- Emergency Procedures
- Client Profiles

## **Volunteer Retainment**

Dedicated volunteers are an integral component of a telephone reassurance program. Compassion and consistency are vital in order to establish trust and provide peer support. In order to retain volunteers, it is important that the Program Coordinator frequently contact volunteers to express appreciation. Let them know that they are the heartbeat of the program. The Program Coordinator should make every effort to let volunteers know that their well-being is important, not just because they are volunteers, but because they are AAA clients. Volunteers decide the number of participants on their list. Keep your volunteer stocked with supplies at all times.

## **Conducting the Call**

Prior to volunteers placing calls, the Program Coordinator will call the participant and give the name of the volunteer that will be calling them. At least 2 calls per month will be made. Volunteer will follow instructions given in training. Peer support questions are asked. At end of call, the volunteer documents on the contact sheet. Volunteers will only call the participants that are assigned to them. Volunteers must abide by privacy rules and procedures during all calls.

## **Resource Information**

The Program Coordinator will provide volunteers with Resource Information from database and other relevant sources.

## **Participant Recruitment**

Participants are recruited from the HCBS waiting list. Participants are clients who have high DON-Rs, who have little or no caregiver support, who are caregivers, and who are diagnosed with Dementia.

## **Emergency Procedures**

In the case of an actual emergency that requires immediate assistance, the volunteer will call 911. Program coordinator and/or Gateway will be notified. Caregiver and/or emergency contact person will be notified also.

## **Reporting/Record keeping**

Volunteers mail report logs to Program Coordinator by the 6<sup>th</sup> day of the following month. Report logs are mailed using the SASE provided to the volunteers. All Heart to Heart files are kept under lock in Program Coordinator's office. Monthly calls are filed electronically.

## **Program Evaluation**

The Program Coordinator will conduct surveys every six months by telephone.

## **Disenrollment**

- Death of participant - at which time we will determine if caregiver would like to be called for a limited time
- Termination by request - client requests to be removed from program.
- Inactive List- participants may be temporarily unavailable.
- Inappropriate Contact- behavior outside the scope of the AAA privacy rules and/or the Heart to Heart guidelines.

## **Discharge Evaluation**

The Program Coordinator documents reasons for discharge. Program Coordinator will notify participant when there is a request for discharge. The information obtained may be used to improve program.

Heart to Heart Telephone Reassurance Program  
Phone Survey

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1. Why did you agree to become a participant in the Heart to Heart Program?
2. Do you know the name of the person who calls you?
3. Do you think that your volunteer is a good match for you?
4. Do you feel safer knowing that you will receive a phone call?
5. Does your volunteer call you at least 2 times per each month?
6. Do you live alone?
7. What do you like least about the program?
8. What do you like best about the program?
9. Would you recommend the program to others?
10. Do you have any comments or suggestions?

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