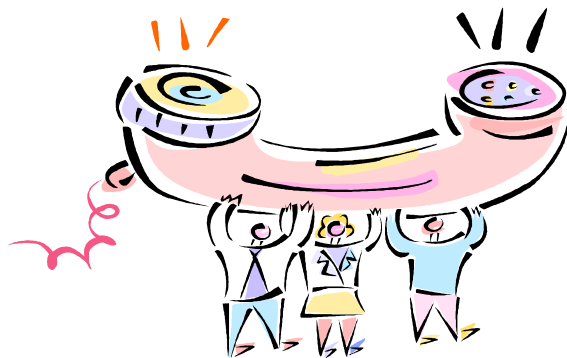


# Telephone



# Visiting

Sponsored by Rabbi Isaac N. Trainin Bikur Cholim Coordinating Council  
A program of the Rita J. Kaplan Jewish Connections Program  
of the Jewish Board of Family and Children's Services

120 West 57<sup>th</sup> Street, 6<sup>th</sup> Floor  
New York, NY 10019

Vicki Rosenstreich, LCSW (212) 399-2685 x229

Robin Schoenfeld, LMSW (212) 399-2685 x212

On the web: [www.bikurcholimcc.org](http://www.bikurcholimcc.org)

Email: [bikurcholimcc@jbfcs.org](mailto:bikurcholimcc@jbfcs.org)

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Many thanks to the people who are already involved in Telephone Visiting and who were graciously willing to share their time with us so that we can present you with a variety of ideas and materials. Thanks to the Bikur Cholim Coordinating Council Executive Committee for its support, guidance and encouragement as we develop the Coordinating Council's "Telephone Visiting Program." We recognize the impact that one individual can have, as well as the power involving many, through a synagogue outreach program and the Jewish family agency.

## The Visitor's Role

Bikur Cholim, or visiting the sick, is more than an act of charity; it is a commandment that is considered binding on all Jews. The importance of visiting the sick was underscored when G-d visited Abraham after he was circumcised (Genesis 17:26-18:1). In the act of visiting Abraham when he was ill, G-d set a precedent for the Jewish people.

Bikur Cholim is a paradigm for interpersonal relationships. "And you shall love your neighbor as yourself" (Leviticus 19:18). The performance of this mitzvah links us to all generations and connects us as one people to each other and to all humanity through the G-dly attributes of compassion and lovingkindness.

The Talmud makes references to scholars and disciples making visits to the sick. The local Bikur Cholim Society was one of the principle institutions established by Jewish communities, the first one formed at the time of the Middle Ages. Bikur Cholim groups continue to exist to this day, in all parts of the world, with people making the commitment to care for one another, and bring the strength of community and connection of Jewish heritage to the bedside.

The ubiquitous telephone! How many of us have gotten calls that lift our spirits or warm our hearts? - like a warm bowl of chicken soup. With forethought and skill the telephone can be used for bikur cholim in a meaningful and efficient way. Many points of visiting are the same whether "*punim to punim*" (face-to-face) or via the telephone; some are different; Both require us to be mindful of the ways we use ourselves so that we are most helpful when we visit.

People who are ill, have disabilities, are elderly, and are confined frequently find themselves increasingly isolated. As a telephone visitor, you can bring hope to someone in need-including the need to know that someone cares. This can be done through a casual conversation, news from the community, an interesting story, or even a few shared moments of silence. Visitors benefit by performing a valuable mitzvah and often gain a sense of satisfaction and self-worth. In these ways, telephone visiting can play a vital role in the life of our community.

The mission of the Bikur Cholim Coordinating Council is to encourage the continuing vitality of the mitzvah of bikur cholim by providing consultation, training, resource materials, and conferences, supporting the efforts of individuals, synagogue groups or society, alike. We provide the following materials to inform you about telephone visiting, a resource to you while you engage in the mitzvah and to help you derive satisfaction from your commitment.

Each of us needs to decide what elements will be useful and convenient as we strive to bring light and comfort to those whom we call.

## TELEPHONE VISITING



Telephone Call Programs are designed to meet the needs of the individual who would benefit from a phone call. The purpose of this call is to provide comfort and companionship for the recipient. Calls are usually made at a determined time, set up through a mutual agreement of the person and the caller. This can be flexible as long as all parties are aware of the time the calls will be made.

There are three basic forms that these calls can take which have different purpose & emphasis:

1. **Telephone Reassurance**- calls that are regularly scheduled to those individuals who live alone in order to provide them with some friendly conversation and to check on their safety.
2. **Safety Check**- calls that are aimed at those people who live alone and whose health places them at risk and, therefore, would benefit by being monitored on a daily basis. A short 5-minute check-in call is made to determine that this individual is "safe."
3. **Friendly Conversation**- calls that are designed to help stimulate interest in the outside world and to help renew the sense that someone cares for them. In many cases, these people are ill or have lost a loved one, have experienced changes in their economic circumstances, have restricted mobility or are no longer active in their community. A friendly conversation is helpful in dealing with isolation. This call usually lasts 10-15 minutes in length and is made once a week or on a consultant basis.

This is telephone visiting.

*An interview with \*Moishe, one person with a mission*

## **Dial Up A Smile / Call A FEW (Friend Every Week)**

**Goal:** "All Israel is responsible one for another." People need to know that someone cares. *You need to be that someone.*

### **Operation of Program:**

- Enter people into speed dial.
- Brief call, averages 60 seconds-2 minutes but can be longer.
- Portable. Can call from cell phone while driving, can call while folding laundry, or while performing any routine task.
- Emergency Plan - get number of close kin in case person doesn't answer.

### **Training:**

- No preparation required!
- "That you *thought* of the person to pick up the phone and call them is 90% of the reassurance. People assume that if you take time out to call, you care; this is *reassurance.*"

### **Attitudes and Values which will guide the work:**

- "In future times, you will be held accountable not for the things you couldn't do, but those things that you could do but didn't do." - Talmud
- "You can earn *olam haba* (the world to come) in a minute." - Moishe's mother
- "Very little effort is required to do an enormous good."
- People are lonely and appreciate being thought of. People appreciate the connection more than you can imagine. - Rabbi Reisman, Brooklyn, NY

### **Referrals:**

- Who to call is up to each individual.
- Who do you know? A relative, friend, or community member.
- Suggestions...someone who lost a spouse may be very lonely, a relative you see infrequently, older singles, people new in your neighborhood, people hospitalized.

### **Responsibility and Boundaries:**

- How will you get off the phone if need be?

BCCC: Plan your exit strategy ahead of time, there will be less possibility for misunderstandings. Clarity of purpose, discussed with your phone pal, will prepare the way.

- If someone is concerned: "why are you calling me?"  
A good response might be "I shouldn't call to wish you a good Shabbos?"  
BCCC: Explain again your commitment to call. Have your reason ready so there is less possibility for misunderstanding.
- If someone asks you for something more than a call.  
You can refuse, but depending on the request and motivation for the request you may be a literal lifesaver to someone. Someone may need some shopping done when their relative goes away. If you can, maybe you should do it.
- 90% of the time people don't make any requests and are very appreciative of the call alone.

### **Commitment:**

- You are committing to call regularly and consistently. You are not attempting to take over their life or adopt the person (unless that is your intention). Moishe recommends initially not saying that you will call every week. This will give you an out if you cannot commit with regularity. Once you do call with regularity (3-4 times) the person will realize and come to expect the phone call. You can see the person's response and adjust your calls accordingly; for instance a longer call might be made less frequently (once or twice a month) and weekly for a quicker call.
- BCCC: Whatever you decide, be sure to follow through as promised.

### **Maintenance:**

When you develop your own list and have some connection with the person, your enthusiasm is less likely to dwindle.

### **Postscript From "Call A Few" to "Dial Up a Smile"**

An idea to reach out to people who are lonely with a simple phone call began over 20 years ago. The incredible ease of the mitzvah and feedback he received inspired Moishe to begin what would become a larger campaign to encourage everyone to do telephone visiting. Two years ago he put an ad in the Jewish Press and the Yated advertising his campaign which they named, "Call A FEW" (Friend Every Week). Torah U'mesorah, then helped publicize Moishe's campaign by presenting it as a chesed option at girls' high schools. The campaign founder then went to the Chofetz Chaim Heritage Foundation who revised the motto, marketed it as "Dial Up A Smile" and put ads in the Jewish newspapers. The message: pick up the phone and call.

You can make a difference.

See Appendix for complete article.

\*a pseudonym, the founder prefers to remain anonymous.

*Organizing phone committees for your synagogue can make a difference. These are three examples.*

## Shabbat Connections

### Congregation B'nai Jeshurun - New York

**Goal:** To enable more isolated congregants, generally 70+, to stay connected to the community.

#### Operation of Program:

- Team leader gets list of prospective participants and calls each person to inquire if s/he would like to receive a weekly call: "We're looking to start intergenerational linkages. Would you like to participate?"
- Interested congregants are each paired with a volunteer; matching is based on mutual interests and hobbies, when possible.
- Forming personal connections is encouraged and Shabbat Connections partners may decide to meet in person and spend time together.
- Calls are usually made weekly before Shabbat
- Volunteers submit updates on their phone contacts to the Team Leader regularly.
- Volunteers may speak with Team Leader if any troubleshooting is needed.

**Training:** Team leader gives volunteers one-page guidelines (see appendix) on points to consider when making a phone visit.

**Referrals:** Come from Bikur Cholim co-chairs, the Rabbis, and other synagogue programs.

## The "Connecting Team"

### Holy Blossom Temple - Toronto

**Goal:** To keep a large population of elder members of the Temple involved in community by giving or receiving phone visits.

**Operation of Program:** Seniors call seniors

Pairs become "telephone buddies with regular weekly calls." Younger seniors call older ones-building on natural connections of cohorts

**Training:** Callers provided with page of suggestions for conversation topics i.e. having to do with Temple activities. (see appendix)

-Telephone callers have ongoing monthly meetings to touch base, get support and plan events such as Chanukah party

-Difficulties reported to Rabbi or team leader

**Referrals:** Rabbis & Bikur Cholim members making visits to hospital or post home visit fill out Bikur Cholim form requesting follow up phone call from Bikur Cholim committee or the "Connecting Team."



## "Sorrow & Simchas"

Wilshire Blvd. Temple - Los Angeles

**Goal:** to convey "caring community concern" to all members at all stages of life. Telephone call is normalized as a custom of the community.

### Operation of program:

2 volunteers are on rotation each week to make phone calls to those people requiring a call that week.

### Training:

- 2 initial training sessions which include meetings with Rabbi & staff for overview of:
  - The role of the Bikur Cholim volunteer,
  - Confidentiality
  - Visitor commitment
  - Patients bill of rights
- Attend 4 educational workshops during the year. Topics pertinent to program e.g. communication skills.

### Referrals:

From Rabbis, friends, congregation "pipeline." People are encouraged to make use of the phone program through notices in synagogue bulletins. Coordinator gets the call and refers it to the volunteer.

### Simcha Referral Calls:

- For lifecycle congratulations i.e. Bar Mitzvah, baby born, condolences, and home from hospital check in.
- Most phone calls are about acute need or life cycle event. If more telephone work is required, the calls can continue for weeks. At some point, a telephone visitor may accept an assignment.

## Techniques for the Telephone Visitor

Those you call should be prepared for the brief, limited type of contact you will be making with them. Both caller and recipient need to know, appreciate, and accept boundaries. Within a synagogue, understanding the nature of the call can be communicated through an article in the news bulletin, through the Rabbi, or through the people in the community. At JBFCs, the Coordinator will explain the purpose and the limits of telephone visiting to those we plan to serve.

### Beginning a telephone relationship:

Keep in mind your main job is to develop a friendly, trusting, limited telephone relationship.

For the first few calls, continue to formally introduce yourself until you feel the person easily recognizes you (i.e. "Hello, this is \_\_\_\_\_, your Telephone Visitor from Synagogue, or JBFCs").

Record any specific information or current issues in your person's life so you may refer to it the next time you call.

### Suggested conversation for the telephone call:

- Continue to formally introduce yourself until the person easily recognizes you, i.e., "Hello, this is \_\_\_\_\_, your Telephone Visitor from JBFCs, or Congregation, etc."
- Follow with questions such as, "I'm calling to say hello and want to know if everything is okay," "How are you today?" "How are you feeling?" "Anything you think I might need to know?" etc.
- Close your conversation with, "Okay, I just wanted to check in (wish you a good Shabbos...) and will call you again \_\_\_\_\_."
- Note that your telephone conversation may require verbal feedback, "I'm listening as commentary to reassure the person you called that you are "with them." Silence, under the circumstances of telephone visiting, is not necessarily golden!
- Remember, your main job is providing them with the comfort of knowing someone is regularly checking in with him/her to see how he/she is. The phone calls are not necessarily intended to be lengthy and in-depth chats towards developing a more involved relationship. Should you be interested in developing such a relationship, or feel that the person needs a more in-depth type of contact, discuss this

confidentially with your Coordinator, Rabbi, and/or Social Work Consultant before taking any further steps.

### **Limiting the conversation:**

You define the telephone relationship and purpose of call by the way you structure the conversation. You may tell the person you enjoy talking with him/her, but that your time is limited. For example, that you have \_\_\_\_ minutes to talk to him/her.

You may also remind your telephone call recipient of the purpose of your call, which is really to check in with them and make sure everything is all right.

### **Ending a Visit:**

The more your relationship develops the more difficult it might be to maintain the limits under the length of the call. It is helpful to establish the following routine from the beginning:

- Keep track of the time
- Before it is time to say goodbye prepare by saying something like "It is almost time for me to say goodbye for today".
- Review the day and time of next visit, perhaps mentioning something you might plan to discuss and express your enjoyment of the time spent that day

Note: If the person continues to lengthen the conversation, it may be a sign that they aren't clear about the purpose of the Telephone Visiting or that a friendly relationship is developing, or that they need additional help. Discuss the situation with the Coordinator, or with your Rabbi so that together you can figure out how to handle the situation.

### **Should there appear to be a problem developing in the persons life:**

- Clearly there will be those times when something is happening, and obtaining more information during your phone call is appropriate. Please refer to the handout on "Interviewing Techniques" for guidelines on obtaining more information.
- Once you have a sense or a picture of the problem, state that you are concerned about the person and what he/she is saying to you. Explain that you would like to be helpful, and the best way you can is to share what has been told to you with the Coordinator or Rabbi in confidentiality. If they agree to this, call the Coordinator or Rabbi.
- They might be resistant to this. It is important to respect the persons wishes and privacy. In this case, discuss the situation in confidence with member of your Bikur Cholim Committee or Synagogue so that together you can strategize how you might proceed.

## **Interviewing Essentials**

Visiting is an investment of time and includes attention, patience, perceptive listening, sincere concern, openness, and communication skills.

Below are techniques to help facilitate communication when talking with the person receiving a call:

### **Open Ended Questions:**

- Use questions that elicit an in-depth response, one that cannot be answered with "yes" or "no."
- Use "How" and "What" instead of "Do," "Did," and "Were."
- Examples:
  - Closed: Are you feeling upset right now?
  - Open: How do you feel right now?
  - Closed: Do you like to read?
  - Open: What are some activities that you enjoy doing?
- Open ended questions are good conversation starters:
  - What was it like growing up in the 1930s (or other date)?
  - How do you like living in your new apartment?
  - How is your family doing?
  - What do you think about\_\_\_\_?
  - How did you feel when\_\_\_\_?

### **Drawing out or helping the person expand:**

- "Tell me more . . ."
- "Tell me about it."
- "Tell me what happened."
- "You seem upset."

### **Clarifying or asking questions to better understand:**

- "I'm not sure I really know what you mean when you say . . ."
- "Let's go over that one more time."

### **Redirecting the conversation:**

- "Thank you for your concern, but I'd really like to hear about . . ."
- "You mentioned before that . . ."

- "Let's go back to . . ."
- "Let's talk about . . ."

### Reviewing past and present efforts at problem solving:

- "Have you talked with anyone about this?"
- "What do you usually do when . . .?"
- "What did you do when this happened before?"
- "What have you done about this so far?"
- "What choices do you feel you might have?"

### Double questions:

- Asking more than one question at a time makes it difficult for the person to answer one or both of them.
- Examples:
  - "How are you feeling? Pretty bad, huh?"
  - "How are things going at home and with your family?"
- In holding a conversation, ask one question and then wait for the answer.

### "Why" questions:

- At times, "why" questions are used as a way to convey judgment and can be misunderstood.
- Asking "Why" makes a person feel as though you are attacking his or her ideas.
- Questions can be easily rephrased to avoid any misunderstandings.
- As in all verbal communication, tone of voice is very important and can change the meaning behind the question.
- Examples:
  - "Why are you late?" vs. "What caused your delay?"
  - "Why did you quit your job?" vs. "How is it that you decided to quit your job?"
  - "Why do you want to eat out today?" vs. "Is there some special reason for us eating out tonight?"

### Responses to avoid:

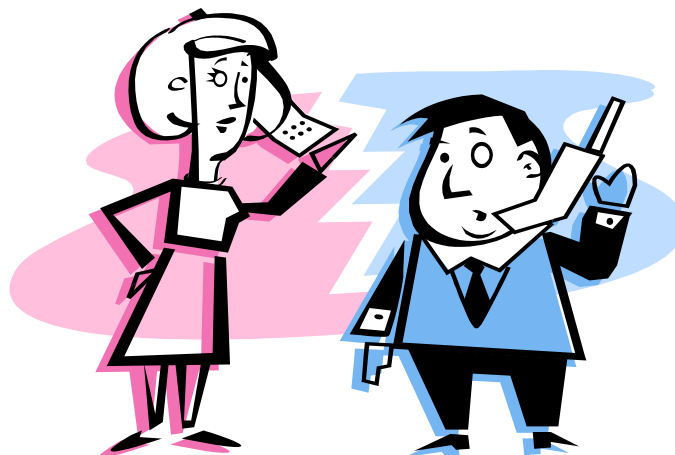
- "Oh, don't worry. Everything will turn out all right."
- "Oh, yes, I know exactly how you feel. As a matter of fact, let me tell you about what happened to me once . . ."
- "That's terrible. She must be a real pill!"
- "What a mistake. You must really regret what you did."
- "According to what I read in *Psychology Today*, you must be depressed because . . ."
- "Well, if I were you . . ."

- "You'd better stay away from people like that."

### **Active Listening:**

- Show that you have heard what the person said.
  - Summarizing briefly the meaning of what was said.
  - Ask if you understood his or her feelings correctly.
- When you listen, just listen. Do not plan your reply while waiting for your turn to talk.
  - Wait until the person that is talking finishes. This way you can gather all the information before responding.
- Making a restatement or paraphrasing. Reflect the feeling or emotion behind what you think was said.
  - Statement: "No one really cares about me."
  - Visitor: "You feel that no one especially is looking out for you?"
  - Statement: "I just couldn't tell her because we were never alone. All those other people are always around."
  - Visitor: "You'd like to get her alone long enough to tell her."
- Do not give advice. Help others to see their strengths and recognize their resources and alternatives. Let them come to their own conclusions.

**Keep an open mind. Be aware of your own values, beliefs, and prejudices. You are participating in another person's world, not judging it.**





## HELPFUL HINTS FOR SETTING LIMITS AND SAYING "NO"

It is especially hard to say NO to two groups of people: people for whom we feel sorry and people for whom we care. The people you will be working with can fall into one or both of these categories. It is important to remember your role and your intentions and what you can and cannot do as a visitor. But when asked to do something that you do not feel comfortable doing, it can still be hard to decline. Sometimes you may feel guilty and therefore obligated to perform the thing asked of you.

**Boundaries-** When we have good intentions and are clear that what we are doing has merit, then when we set boundaries we need not be apologetic, and there is no shame in that for ourselves or for the other. Healthy boundaries are established when the attributes of lovingkindness and strength are in balance...

*Rabbi Uzi Weingarten course on: "Communicating with Compassion"*

The following is a list of suggestions to help you in saying NO and setting limits with your person:

### BE AS BRIEF AS POSSIBLE

Simply state a legitimate reason for your refusal, "I really don't have the time," and avoid long, elaborate explanations, justifications, and "lies" (e.g. "I can't because my mother is coming in from out of town" or "My child is ill").

### ACTUALLY SAY THE WORD "NO" WHEN DECLINING

The word "no" has more power and is less ambiguous than, "Well, I just don't think so" or "We'll see" or "I can't just now."

### REPETITION AND PERSISTENCE MAY BE NECESSARY

You may have to decline several times before the person "hears" you. It is not necessary to come up with a new explanation each time. You can use your original reason over and over again.

### BOYCOTT THE WORDS "I'M SORRY"

Try to be conscious about using this phrase to excuse your refusal or otherwise weaken your credibility. Habitual use of this phrase can be distracting to your real intent.

# CREATING A SAFE SPACE

## Demonstrating Respect

Respect for those you speak with and their world requires sincere interest. When you feel that you require more information or more details, don't press immediately if it involves cutting off or diverting the callers' train of expression. Be patient and let the story unfold.

## Acceptance

As an attitude, acceptance conveys a positive respect for the worth and integrity of the person and implies that each of us has inherent value as a unique individual.

Acceptance is a simple technique of responding with short phrases, such as "Uh-huh" and "yes, go on," which imply an attitude of acceptance.

Showing acceptance does not mean that I have a duty to do something with your feeling or to get you to stop feeling that way.

## Empathy: An Accurate Understanding

Empathy is based on listening, identifying feelings with no need for judging them, and verbalizing those feelings to aid a caller in reflecting on what they have said and indicating your attention and desire to understand. By definition, an empathic response must contain a *feeling word*, and often attaching words to affect can be difficult.

It is not necessary that the listener experience the other's feelings; what is needed is an appreciation of those feelings. In this way you can be aware of your own feelings as well as moods or feelings of the other that s/he may be aware of only in a vague sense. This kind of empathy can be illustrated by the following example: a man calls and says he has just returned from a trip and has found that his friend is very ill. He tells the volunteer in a dull tone of voice that he's just sitting there alone not knowing what to do. An aware listener might respond,

"It sounds like you're feeling sad and worried right now"

Though the caller did not actually say any of those things, you may assume that those feelings are present, even when the person himself has not identified them yet. Be open to correction if you are not quite accurate. This feeling identification and verbalization may help clarify the situation. Then he can begin to focus on whatever aspect of the situation is the most troublesome. (see appendix for Feelings chart)

## Tips for Working with the Frail Older Adult

**When an older person expresses a desire to die, what he or she really may be saying is that he or she wants desperately to get relief from some current painful situation.** He or she may feel neglected, have a terrible headache, feel unwanted or any number of things, many of which are temporary. It is important to discover the reason. Once you do this, you can get down to the specifics. Meaningless generalities, such as "It's a beautiful day today and you should want to see it" or "You'll feel better tomorrow" accomplish nothing. Before you can be truly helpful, you must first find out the reason he or she wants to die. Ask the person to explain him or herself. If you are still concerned, call the Coordinator or Companion Services.

**When an older person tells us that he or she feels so old,** it is easy for us to want to jump in with reassurances that they are not old, but this kind of quick denial tends to reinforce a negative concept of aging, implying that aging is indeed undesirable. There is a reason why this older person may feel older today. He or she may be tired, depressed, etc., all of which could change tomorrow. The best response might be, "what do you mean?" This might lead to the reason why he or she feels so old, in which case you are in a better position to respond or help.

**When an older person is resentful,** we must accept this as a normal reaction and not take it personally. Some older people, who are forced to limit their activities, often show resentment of "whole" persons. People who visit those with limited mobility should have the ability to recognize and accept a reasonable number of expressions of resentment. The volunteer who is greeted with, "Go to hell, you old bat" may be startled but should not become upset over the incident. It is resentment being voiced and would be said to any person, not just the volunteer. However, we can and should expect some civility from our person and if this becomes an ongoing issue, please speak with the Coordinator of Companion Services.

**When the older person is fearful or anxious,** he or she can benefit just by talking about his or her problems with an understanding person. When someone comes to us with what he or she perceives to be a problem, we can either encourage or discourage this person by our response. By inviting the person to share his or her feelings with us, we are providing him or her valuable service. We may not perceive the problem with the same degree of intensity, but for the older person, it is real and it may be of supreme importance.

**For Bikur Cholim Good Practice:**

**When a person is dying,** we should never assume that the person cannot understand what we say, no matter what his or her condition. It is good practice to never say anything in front of the person that we would not want him/her to hear. Too often people say things

within hearing distance of a dying person whom they believe is unresponsive, only to learn later that what they said was fully understood. A person may be dying, but he or she is still alive at this moment and acknowledgment of what is happening is the most direct and honest response.

**Whenever a confused, mentally impaired person asks you the same questions many times during the day** ("What day is it today") you have to understand that he or she really does not remember that the question has already been asked and answered before. To him or her, it is still the first time. So it is rude and pointless to argue or tell the individual that you have already answered their questions before. Instead, allow your patience to guide you. Answer the question ("It is Tuesday"). True, your answer this time is not going to prevent him or her from asking the same question later, but neither would any other response. And after all, tomorrow you can come up with a different answer.

Adapted from *Partners in Caring Volunteer Manual*. Fremont Public Association (Arinna Moon, 1994)

## Special Concerns

A person may experience one or more losses that affect his or her ability to communicate and understand. **Awareness** of an individual's limitations (loss of vision, hearing, medication side effects or a disease that brings confusion and/or disorientation) and the use of **special communication techniques** will **improve the quality of your visits** whether by telephone or in person.

### Declining Hearing:

- Speak slowly and clearly, not loudly, but in a lower tone of voice.
- Keep words and sentences short.
- Ask person if it is okay to turn off background noise when speaking (radio, TV and other distractions).
- Ask the person if they are able to hear you.
- If you must repeat what you have said, try rephrasing it.
- Remember, it is easier for the hard of hearing person to talk than to listen.

### Difficulty with Speech:

- Do not speak loudly unless you know the person has a hearing impairment.
- Take 3-5 minutes to listen to your person's speech pattern. You will pick it up with patience.
- Turn down the radio and TV so you are not distracted (Make sure to ask if this is okay with them).
- Do not finish sentences for another person. Again, use patience and give the person a chance to express his/her needs.
- Be aware of the tone of your voice. Does it convey frustration, anxiousness or anger? Try to use a calm, soothing voice.
- Assume there is capability for insight. If someone refuses to do something they ordinarily enjoy doing, it may be that they are sad, angry frustrated, anxious, preoccupied, etc. about their condition. Check to see if this is so, and offer support.

### Memory loss, disorientation or confusion:

- Use short sentences. Break down instructions into components: "Put your arm in the sleeve." "Button up."
- Ask one question at a time. **Avoid** asking open-ended questions.

- Listen actively. Do not pretend. If you do not understand something, ask the person to repeat the information. If this upsets the person, offer your best guess.
- Give directions as close to the time they must be followed as possible (within an hour, rather than the morning or day before).
- Orient the person to upcoming situations. Tell them what is about to happen. "I'm going to have to end our conversation in 2 minutes."
- Stick to a schedule as much as possible.
- With bizarre behaviors and stories, try to determine the feelings behind the stories (fear, anger) and acknowledge those feelings.

Adapted from Partners Caring Volunteer Manual. Fremont Public Association. (Arinna Moon, 1994)

## Role Plays

### Challenging Situations



1. Visitor calls for a normal, (daily) call. The person gives brief, non-descript answers. With further questioning from the visitor, the person relates that her/his schedule is changing and variable.  
**Person:** "Friends usually stop by on Tuesday and Friday, sometimes my son calls on Wednesday, and the grandchildren often call on the weekends. How about if you just call me on Mondays and Thursdays, sometime in the afternoon?"

**Caller:** "I should be able to accommodate that schedule, it's a little confusing, but I can adapt to it."

2. Volunteer checks in to find that the person is very distressed.

**Person:** "My daughter didn't come to take me shopping this week. I'm so hungry. What am I going to do?"

**Caller:** "Meals-on-wheels are available. I tried to get you to sign up with them before, but you refused."

**Person:** "I don't like frozen meals, and I can't afford them anyway. What will I do this weekend?"

**Caller:** "I know of a restaurant in the area you live that can deliver meals to you. I can call to arrange for that right now."

**Person:** "I only like home cooking."

**Caller:** "I will call Coordinator/Bikur Cholim or Rabbi and see what they suggest. They will call or I'll call you back."

3. Scenario in which person gives subtle hints that there is a problem and a change. Volunteer has to dig a bit to discover that her memory really is getting worse and she's not eating regularly (she simply forgets).

**Caller:** Calls Coordinator to report person's loss of memory and inability to take care of meal preparation and eating regularly.

4. **Caller:** "It is nice to speak with you again."

**Person:** "I've been really lonely, and I feel we've grown so close over these past six months. You're almost like a child to me, even better than a child. I know that you have certain responsibilities that JBFCS has placed on you. You can't do certain things, go certain places, drive me in your car, and so on. There are so many things we could do together if it weren't for JBFCS. How about if we just visit with

each other and you forget about being an official volunteer for JBFCS. I'm sure they won't mind, with all the other volunteers they have to work for them."

**Caller:** "I must respect my commitment to that program."

5. Caller & person called, greet one another and briefly engage in chitchat.

**Person:** "I have a doctor's appointment tomorrow, and I don't have a ride. Darling, is there any way that you could take me?"

**Caller:** "My wife has been really sick and we have been running to every doctor in the city. I don't have the time right now."

**Person:** "What about all the relatives you and your wife have in Seattle? You would think that somebody could help you out with all these appointments. After all, you know that I have no one. You think if a relative could help just this once, then you would be able to help me? Your wife is sick so often. I'm just asking this one time."

**Caller:** "I know how hard it is for you to get to these doctor's appointments. I can't help you, however. I will call Coordinator and let her know what your problem is and see if she can help you figure out your transportation need. I will definitely ask her to call you."

**Caller:** Calls Coordinator

6. Note: Caller doesn't cut off the person. The phone call recipient is given an opportunity to vent and the caller respects the feelings that emerge. Afterwards, the caller tries to change the tone to one that's more positive.

**Caller:** Hi, How are you today Mrs. Bloom?

**Recipient:** Bad.

**Caller:** Bad?

**Person:** I feel old. My knees hurt, I just can't do for myself like I used to.

**Caller:** Uh huh...tell me more, I'd like to understand.

**Person:** This is the way it is when you get old, plenty pf aches and pains.

**Caller:** Sounds like aging can be a challenge.

**Person:** You know the golden years aren't so golden.

**Caller:** Sounds like things have been rough for you, have there been any bright spots?

Adapted from the JFS Seattle and Seattle Association for the Jewish Disabled "Companion Services"

# Emergency Procedures

Having a plan of action is essential in the event that an emergency arises in the course of your work visiting by telephone: This is particularly relevant if you are making daily check- in calls.

- If the person does not answer the phone at the regularly scheduled time let the phone ring 20 times.
- If they do not answer the phone, wait another 15 minutes and call back.
- If they *still* do not answer the phone, wait another 15 minutes and call back.
- If there is still no answer, call an "Emergency Contact" person, whose name(s) you have been given. Ask the person to check on their well being and call you back.\*
- If no one on the "Emergency Contact" list can be reached, call 911 and ask for an apartment check.

## Emergency Contact List

PERSON'S NAME: \_\_\_\_\_

Physician: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Hospital of Choice: \_\_\_\_\_

### **First Emergency Contact:**

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

Telephone Number: \_\_\_\_\_

Relationship: \_\_\_\_\_

### **Second Emergency Contact:**

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

Telephone Number: \_\_\_\_\_

Relationship: \_\_\_\_\_

### **Third Emergency Contact:**

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

Telephone Number: \_\_\_\_\_

Relationship: \_\_\_\_\_

### **\*Contacts:**

Rabbi or Social Work Consultant to be notified.

Bikur Cholim Coordinator to be notified in case of emergency.

Neighbor, Friend, Building Superintendent, Family Member

# APPENDIX

- A. Structure for your Telephone Visiting Program
- B. Shabbat Connections Guidelines
- C. Holy Blossom Information Form
- D. Dial Up A Smile article
- E. Categories of Feelings Charts
- F. Publications List
- G. The Art of Good Listening article

## **Additional ideas for structuring your Telephone Visiting Program at your Synagogue, Community Group or through Bikur Cholim Coordinating Council of JBFCS**

### **Qualifications for being a telephone visitor:**

- Interested in working with the elderly, homebound individuals, and mindful of others who could use the connection.
- Reliable, patient, and able to engage in active listening.
- Should be a member of the Jewish community and familiar with resources within the community.
- Able to set limits (i.e., if they want more of you than seems appropriate, or than you want or are able to give).

See appendix for further ideas on structure for your telephone visiting group

### **Responsibilities:**

- Call your person daily/weekly at the pre-arranged, specified time.
- Allow phone to ring ten to fifteen times.
- The call should be made at the same time each day/week. As agreed on by both parties.
- If they do not answer the phone, follow your Emergency Procedure Format.
- Identify and inform the Coordinator of any change in persons circumstances or relationships.
- We respect confidentiality. Information pertaining to the needs of each person should be shared with Coordinator but we have legal responsibility not to share any information with outside parties except as provided by law.

### **Requirements:**

- Minimum six months commitment to telephoning (substitutes are available when volunteers leave for vacations or are otherwise unavailable for short periods of time.)
- One 2-5 minute call up to seven times a week or weekly phone call depending on need and goal of program.
- Submit monthly log
- Monthly phone consultation and biannual in-person meeting with Coordinator
- Participate in volunteer group meetings (approximately 1 ½ hours, to be held biannually).
- Attend at least two agency-sponsored workshops a year (workshops are offered on a rotating monthly schedule). Also attendance at Bikur Cholim Annual Conference is encouraged.

### **Benefits:**

- Perform a valuable *mitzvah*
- Make a difference in others' lives
- Gain a sense of satisfaction and self-worth

# Notes

