

ADVANCING
STATES



Leadership, innovation, collaboration
for state Aging and Disability agencies

Conversation Tips Toolkit: Supporting Reassurance and Check-In Programs

Best Practices for Volunteers

Conversation Tips Toolkit

Our agenda for today's webinar:

- Share how we got here
- Describe the human-centered design process for developing the Toolkit
- Introduce and walk through the Toolkit
- Tell you about a fun activity to use with the Toolkit
- Show you how to access the Toolkit

Presenters

- April Young, Senior Director, National Core Indicators – Aging & Disabilities, ADvancing States
- John Zoshak, Emergency Design Collective, MS Candidate HCDE, University of Washington
- Samantha Gardner, Senior Policy Associate, ADvancing States
- Nanette Relave, Senior Director, National I&R Support Center, ADvancing States

COVID-19 and Focus on Social Isolation

- Spring 2020: Started hearing from states that social isolation and loneliness was an urgent concern
- ADvancing States responded by collecting and sharing information with states



Addressing Social Isolation for Older Adults During the COVID-19 Crisis

Updated as of 10/14/2020

ADVANCING STATES 

Emergency Design Collective

- Emergency Design Collective saw the resource and reached out to ADvancing States
- Brainstormed ideas based on what we had been told was going on in the field
- Reviewed trends in state information
 - Telephone reassurance programs; wellness checks
 - Utilizing new volunteers as well as state staff

The Toolkit

- Utilizes human centered design
- Drawing on expertise:
 - AIRS
 - TN Commission on Aging and Disability

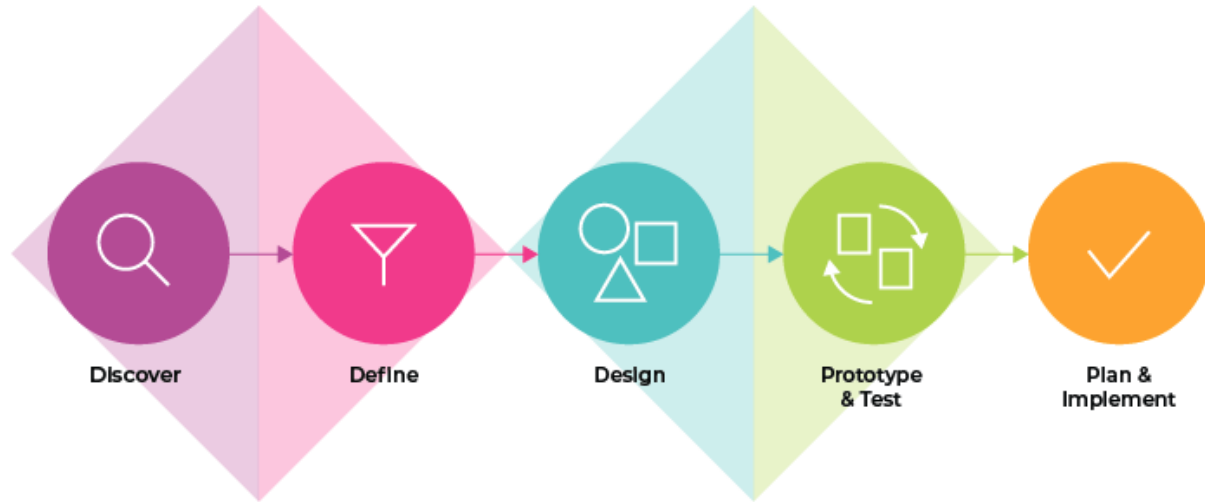
Emergency Design Collective

- Ad-hoc group of technologists, designers, and engineers looking for high impact projects to help the country battle COVID-19.
- My group was focused on improving the experiences of older adults in isolation.
- Partnered with ADvancing States after conducting user research with them!



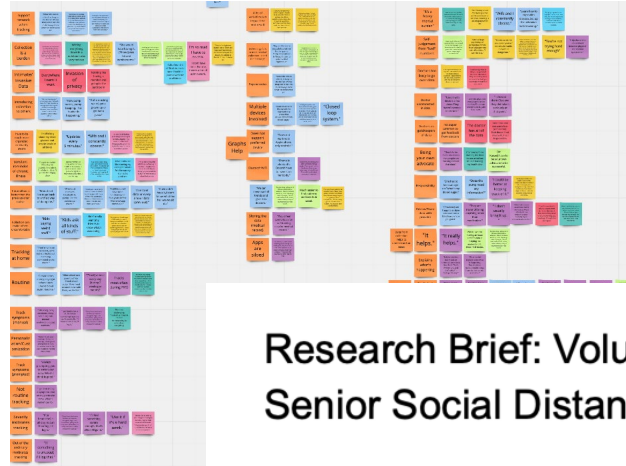
**EMERGENCY
DESIGN
COLLECTIVE**

What the EDC Contributed: Human Centered Design



What the EDC Contributed: Methods

- Volunteer Interviews
- Research Synthesis
- Brainstorming
- Prototype Creation



Research Brief: Volunteers for CBOs, Senior Social Distancing Calls

Research Questions

What are the pain points and highlights of calling older adults?

- The experience of the calls are going to be our primary focus.

What was the training experience like?

- With a secondary focus on the training experience -- we might as well ask about this to see if anything sticks out / we might do a follow up process around training.

About the Toolkit

This toolkit is a collection of tips for people volunteering with older adults. These tips are designed to be shared with volunteers over a period of time to support the abilities of a volunteer.



Building Trust

Tips for building trust and rapport with seniors



Engaging Conversation

Tips for creating engaging conversation



Access to Information & Resources

Tips for accessing information and resources and setting expectations about their roles



Caring for Yourself

Self care tips for volunteers

What is a Tip?

When creating a new tip, follow this guidance.

Good Tip	Bad Tip
A concrete action that a volunteer can apply right away	An abstract idea that a volunteer has to interpret
Specific and focused on a single action	General and focused on a broad idea
Stand-alone	Requires previous knowledge or context
Understandable to the general public	Full of technical jargon
Concise and easy to remember	Overly wordy and difficult to remember

Tip Example

Good Tip	Bad Tip
Laugh when you can	Be friendly
Treat people like how you would treat your friend's grandparents	Be respectful
Ask about the weather	Make small talk

How to use this Toolkit?

These tips are meant to **reinforce volunteer training** and **not replace training** .

They can be distributed **during** a training or **after** a training.

They can be shared **all at once** or **over a period** of time.

Examples of how to distribute these tips

- “**Tip of the week**” emails sent to volunteers
- Printer-friendly “**cheat sheet**” distributed at volunteer trainings
- A collection of “**tip posters**” displayed in rooms where trainings happen
- A series of “**tip of the day**” social media posts
- We also have created a “Buzzfeed Style” quiz referencing *The Golden Girls* to serve as an entry point to this guide.
 - The quiz is available on [ADvancing States IQ](#) along with the Toolkit

Example



Advancing States Tip of the Week

Share an Interesting Fact about Yourself



A conversation is a two-way street, so keep it engaging by sharing some details about yourself. Just remember to keep the focus on the person.

INTERESTED IN LEARNING MORE? Check out additional training resources related to that tip!

- [Enhancing Socialization through making meaningful Volunteer Connections during COVID-19 \(The National Resource Center on Nutrition and Aging\)](#)

Announcements

Briefly share your news in a sentence or two, and consider using a list to show the most important details, for example:

- **Key Communication Techniques Training Workshop** on 11/1/20 [@ZoomLink](#).

Previous Tips

New to the program? Want a refresher on previous tips? Here are a few!

- Ask about their favorite things
 - Ask about their past
 - Focus your attention on the person
-

References and Resources

The following materials were used to develop this Toolkit and can be a further resource for telephone reassurance programs.

2020 AIRS I&R Training Manual is the Alliance of Information and Referral Systems at www.airs.org

Key Communication Techniques for Aging and Disability Professionals This online training course can strengthen communication skills. Visit ADvancing States IQ at <https://www.advancingstatesiq.org/>

Enhancing Socialization through Making Meaningful Volunteer Connections during COVID-19. The National Resource Center on Nutrition and Aging, June 3, 2020. This brief has additional tips for volunteers and a template for a Talking Points call log. See <https://nutritionandaging.org/wp-content/uploads/2020/06/Enhancing-Socialization-Through-Making-Meaningful-Volunteer-Connections-During-COVID-19-6-3-2020.pdf>

Addressing Social Isolation for Older Adults During the COVID-19 Crisis. This resource from ADvancing States identifies social engagement strategies and initiatives across the country. Visit <http://www.advancingstates.org/initiatives/covid-19-resources/advancing-states-resources>

Building Trust

Tips to help volunteers build trust and rapport with older adults.



TIP BUILDING TRUST

Laugh when you can

Laughter really is the best medicine. Humorous moments often arise, even in the most difficult and stressful caregiving situations.

Be open to the opportunity to lighten things up and take things a little less seriously. **A shared laugh can ease tension and build closeness.**

However, be sure to laugh ***with them*** and ***not at their expense.***

TIP BUILDING TRUST

Pay attention to the person

Minimize distractions. Make calls when you have the time to be present and available.

Listen without thinking about what you will say next.

Try to connect with them on a personal level, interested in what they have to say.

TIP BUILDING TRUST

Be Patient

Do not rush the conversation. Listen until the end as they may have more to say.

Allow for small talk.

Allow for short pauses, give the person time to think and speak.

TIP BUILDING TRUST

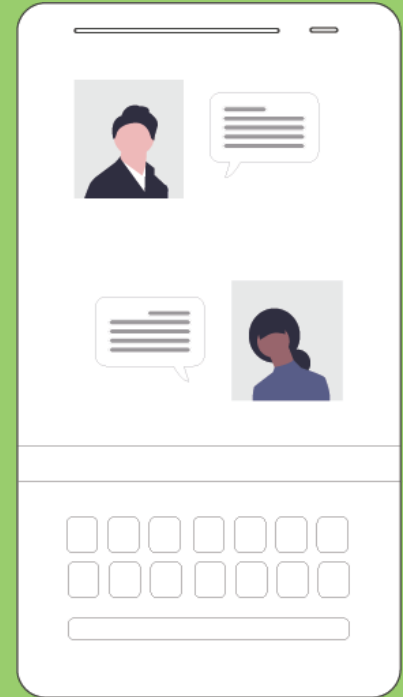
Smile, even on the phone.

Smiling can convey warmth through the phone.

Smiling creates a welcoming and friendly tone.

Engaging Conversation

Conversation starters and other tips for starting and maintaining a conversation



TIP ENGAGING CONVERSATION

Ask about their favorite things

Asking a person about their favorite things shows that you are interested in learning about them.

Examples:

What is your favorite show or movie?

What is your favorite meal?

What is your favorite holiday (or season)?

TIP ENGAGING CONVERSATION

Ask about their past

Older adults often like to talk about their family, memories from their past, and life experiences.

Examples:

Can you share a favorite childhood memory?

What did you and your friends do for fun when you were younger?

What was the best lesson you learned that you would pass along to younger adults?

Who were the most important people in your life?

What is the key to happiness for you?

TIP ENGAGING CONVERSATION

Use conversation prompts that invite people to add more detail to what they are telling you.

Phrases like “Tell me more...” and “What was that like...” are great ways to show interest in what you are hearing while inviting your conversation partner to continue talking.

Have a few conversation prompts on hand.

It may be helpful to take notes so that you can remember information important to the person for future conversations.

TIP **ENGAGING CONVERSATION**

Ask about the weather

Small talk is **OKAY!** Asking about the weather is one of the easiest ways to start small talk because it is a relatable topic.

TIP ENGAGING CONVERSATION

Share an interesting fact about yourself

A conversation is a two-way street.

Be willing to share something relatable about yourself.

Just remember to keep the focus on the person.

Access to Information & Resources

Tips for accessing information and resources and navigating role and boundary confusion



TIP ACCESS TO INFORMATION AND RESOURCES

Being a caring voice is your primary role

Telephone reassurance is support that offers comfort.

People know if you are sincerely trying on their behalf and appreciate it.

Sometimes what is most helpful to a person is the chance to talk with someone and be listened to.

TIP ACCESS TO INFORMATION AND RESOURCES

Know your role in helping to meet needs

Know how to report needs back to the agency that you are volunteering with.

Know the trusted referral resources that you can provide.

Don't provide information based on an informal Google search.

Don't provide personal advice.

TIP ACCESS TO INFORMATION AND RESOURCES

You are not responsible for a lack of services

You are not responsible for the places you are referring people to.

While it may be tempting to provide assurances, do not make promises about services.

Understand that needs often outpace available resources.

TIP ACCESS TO INFORMATION AND RESOURCES

Be aware of your own feelings

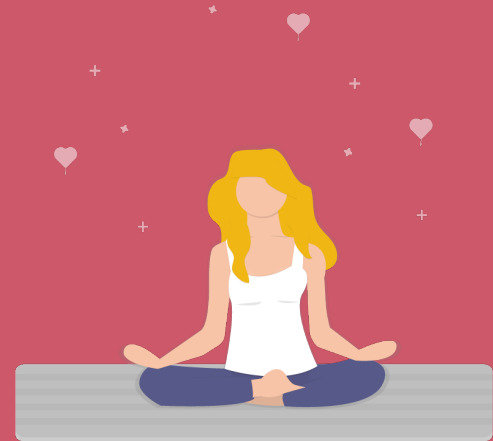
In working with individuals, it's important to be aware of our personal feelings about people.

Some things to think about on your calls:

- How do I feel when I am talking with this person?
- Does this person remind me of someone in my life?
- What role do I find myself playing with this person?

Caring for Yourself

Self care tips for volunteers



TIP CARING FOR YOURSELF

Notice how stress affects your body and mind

A stressful or difficult call can have physical impacts. These impacts can accumulate over time.

- Worried thoughts
- Difficulty paying attention
- Shallow breathing
- Fatigue

TIP CARING FOR YOURSELF

Find Self-Care Activities that Work for You

Self-care practices are any activities that help you to relax and help you to stay engaged.

- Physical activities like walking and stretching.
- Creative activities like doodling and crafting.
- Calming activities like meditating and breathing.
- Connecting activities like spending time with friends.

TIP CARING FOR YOURSELF

Say no when you need to

While it can be hard to say “no,” feeling okay with saying no is also part of self-care.

TIP CARING FOR YOURSELF

Identify someone you can talk to if you have a stressful call

Talking to people about their challenges may cause you stress, especially when you feel like there is nothing you can do to help.

Know who you can talk to at the agency that you volunteer with if you have had a stressful call.

If there is no one you can talk to, consider these other actions:

- Writing about your experience in a journal
- Taking a short walk

Quiz: Which Golden Girl Best Represents Your Volunteer Style?

INTERACTIVE CONTENT

HSP Want to know which Golden Girls character best represents your volunteer-style?



Photo Source: Allstar Picture Library Ltd. / Alamy Stock Photo

Being a volunteer for outreach to older adults during COVID-19 can be incredibly rewarding! However, it is very important for your own sake that you are able to maintain boundaries, manage your stress and keep a positive attitude. Take this quiz to figure out which of the Golden Girls your volunteering-style is most like and then get some resources to help you help others.

Live Demo of Toolkit

- Let's review how to access the toolkit online!
- **<https://www.advancingstatesiq.org/>**
 - Conversation Tips Toolkit: Supporting Reassurance and Check-In Programs

Questions?



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For more information, please visit us at
<http://www.advancingstates.org/>