# Mental Health America Fredericksburg Region



## Senior Visitors Volunteer Handbook

SENIOR VISITORS

**VOLUNTEER ORIENTATION AND TRAINING** 

Last updated: January 2025

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Parbang Barlow\_

Barbara Balow Executive Director

Sincerely,

## Mental Health America Fredericksburg Region

An Affiliate of Mental Health America



Dear Senior Visitors Volunteer,

On behalf of the Board of Directors of Mental Health America Fredericksburg Region, we wish to welcome you as a volunteer with our agency. Your service to our community is valuable and benefits many lonely older adults who simply need someone to talk to, someone to listen. We appreciate your volunteer spirit which makes our community a better place to live, work, and play.

Mental Health America Fredericksburg Region has been serving our community for over 60 years. Founded in 1955 by local citizens, our mission is to address the behavioral health and substance use needs of our diverse communities across the Fredericksburg region by identifying gaps in local services and creating unique programs and partnerships to address them.

Once again, welcome to MHA fred and we hope you will have a satisfying experience as a volunteer with Senior Visitors.

## About Mental Health America Fredericksburg Region

Mental Health America Fredericksburg Region (MHAfred) is a nonprofit 501(c)3 charitable organization serving the City of Fredericksburg and Stafford, Spotsylvania, Caroline, and King George counties. The organizational mission is to address our diverse communities' behavioral health, and substance use needs across the Fredericksburg region by identifying gaps in local services and creating unique programs and partnerships to address them.

## **About Senior Visitors**

One of four MHAfred programs, Senior Visitors, is a socialization program that seeks to mitigate social isolation and loneliness, which are risk factors for depression. Older adults (participants) are matched with trained volunteers and meet weekly through home visits, phone calls, texts, emails, video chat, or other means. Participants are usually 60+ and in situations that keep them from leaving their homes or staying active in the community. Also, there is no cost to participants since this program is part of MHAfred's community service mission. Volunteers are 18 or older and asked to commit at least six months to our program. (See the Senior Visitors Volunteer Job Description on page 6 for more information about duties and responsibilities.)

#### What We Do Not Do

The Senior Visitors is not a home health agency or companion aide service. Therefore, volunteers are prohibited from providing related services such as transportation, medical, running errands, shopping, and cleaning.

## **Volunteer Recruitment**

#### **Eligibility of Volunteers**

Individuals may apply to volunteer if they:

- Live or work in the City of Fredericksburg and the counties of Caroline, King George, Spotsylvania, and Stafford.
- Are 18 years of age or older.
- Can meet the responsibilities outlined in the Senior Visitors Volunteer Job Description, including time commitments (See page 6).
- Must have regular access to phone and internet-based technology such as email and

Microsoft Teams. (If access is an issue, please ask the Senior Visitors Lead for assistance.)

#### **Application Process**

Potential volunteers interested in learning more about Senior Visitors are invited to review this Volunteer Handbook before applying. Please get in touch with the Senior Visitors Lead with any questions.

Individuals interested in applying must complete a <u>Volunteer Application Form</u>, which is also available on the MHAfred website under the Senior Visitors section. Additionally, assistance can be requested by contacting our office at (540) 371-2704.

## **Screening Process**

- 1. The Senior Visitor Lead reviews each Volunteer Application for appropriate fitness based on the Eligibility Requirements outlined above.
- Applicants meeting eligibility requirements will be contacted for an interview. Part
  of the interview will be spent reviewing the Senior Visitors Volunteer Job
  Description (page 6) and discussing the applicant's ability to meet all position
  requirements.
- 3. After a successful interview:
  - 1. Personal Reference Check: The Senior Visitors Lead will check the applicant's references.
  - 2. Background Screening: Both a Criminal History and Sex Offender Search will be conducted through the Virginia State Police. (MHAfred will pay all related costs.)

#### Senior Visitors Volunteer Job Description

Position Title	Senior Visitors Volunteer
Reports to	Senior Visitors Lead

#### **Position Purpose**

Senior Visitors is a program that mitigates social isolation and loneliness, which are known risk factors for depression and among the top three risk factors for suicide in older adults (participants). This goal is accomplished by volunteers providing socialization to participants through phone, text, video chat, or in-person meetings at a participant's home or in the community.

#### Qualifications

- Live or work in the Fredericksburg, Virginia region.
- Are at least 18 years of age.
- Can meet the responsibilities outlined in this Senior Visitor Volunteer Job Description, including time commitments.
- Should have regular access to phone and internet-based technology such as email and Microsoft Teams. (If access is an issue, please ask the Senior Visitors Lead for assistance.)
- Reliability: the ability to consistently attend required meetings and communicate with the participant at scheduled times.
- Strong communication skills and personal boundaries.
- Compassion and empathy for others.
- Ability to accept constructive feedback and willingness to learn about mental health, aging, peer support, and wellness tools.

#### **Duties and Responsibilities**

#### <u>Onboarding</u>

- Participate in volunteer orientation.
- Review the Volunteer Handbook and bring any questions to monthly volunteer meetings.
- By participating in Senior Visitors, volunteers agree to follow the policies, procedures, and guidelines established by MHAfred.
- Volunteers will not be matched with a participant until all screening and onboarding requirements are completed.

#### Supervision

- Monthly volunteer group meetings will be held. Volunteers who are matched are required to attend these meetings. A volunteer can have three excused absences in a calendar year. Talk to the Senior Visitors Lead for special circumstances.
- Record monthly (or weekly) contact data.

#### Ongoing Training & Communication

• Attend monthly meetings for updates and training.

- MHAfred staff will communicate with volunteers in the following manner:
  - English language: MHAfred staff will use the English language to communicate with volunteers written and verbally.
     Monthly Meetings: Will include training topics as well as updates such as new policies, changes in procedures, general information, and special events.
  - Virtual surveys: Staff periodically use virtual surveys to collect data from volunteers.
    - Surveys invitations will be sent via email.
- Emails: Used to communicate one on one with volunteers regarding questions, concerns, or personal information related to a participant to ensure that personal information remains private.

#### Maintain Consistent Contact with Participants

- Maintain consistent contact with the assigned participant(s) at least once per week. Work with the participant to determine a schedule and mode of communication.
- If you need to miss a scheduled call or visit, do your best to inform the participant beforehand.
- MHAfred staff will not give out a volunteer's contact information to a participant unless the volunteer has given MHAfred permission to share this information – you can designate what information can be shared and with whom. (It is not uncommon for some participants to lose contact information. Without this consent, MHAfred cannot provide contact details directly to a participant.)

#### Maintain Records

- Review and submit the signed Volunteer Agreement annually in January.
- Communicate changes in address and/or telephone numbers to the Senior Visitors Lead.

#### <u>General</u>

- Maintain confidentiality as outlined in onboarding paperwork.
- Communicate any concerns with the Senior Visitors Lead.
- DO NOT GET involved in family matters, and engage in discussions about legal, health, or financial matters.

#### <u>Travel</u>

- Volunteers are not required to travel; Further, no volunteer hours can be spent driving:
  - $\circ~$  Time spent traveling to and from in-person visits is not included in volunteer hours.  $\circ~$  Volunteers cannot run errands for participants.
  - Volunteers <u>must not</u> drive participants.
- A volunteer and participant may take public transit or a ride service together. The expense is not reimbursable through MHAfred. (<u>Healthy Generation</u>, a nonprofit providing services for seniors, has a helpful guide to local resources <u>Mobility</u> <u>Options</u>.)
- A volunteer and participant may choose to meet at a location in the community each providing their own individual transportation.
- A volunteer and participant may go for a walk together as determined by the individual's mobility and comfort level.

#### <u>Location</u>

Senior Visitors serve older adults in the City of Fredericksburg and Spotsylvania, Stafford, Caroline, and King George counties.

#### **Benefits**

Volunteering with Senior Visitors provides unique benefits. These benefits include:

- Membership in a supportive and encouraging community of volunteers.
- Education on local resources and MHAfred staff assistance to locate resources.
- Professional letter of recommendation (upon request).
- Credit hours toward university, school requirements, or <u>Peer Specialist</u> hours.
- Meaningful connection with older adults in our community!

## Mental Wellness as a Volunteer

#### Healthy Boundaries

Maintaining healthy boundaries is a critical part of volunteering that benefits both the volunteer and the participant. The following steps are recommended for boundary creation and maintenance:

- Have designated communication tools that respect the participant's skill level and preferred contact method.
- Create a schedule and strive for consistency. 

   Think about how often you're willing to speak with your participant. (Every other day? Once a week? The volunteer role requires that volunteers be available at least once a week.) Once you identify this, communicate your availability to the participant and let them choose the schedule.
  - Identify who calls who and when.
  - Stick to the call schedule. Consistency and predictability are essential for both of you. 

     If the person could benefit from more frequent calls and you have additional availability, you can offer to do so. Follow the same process as creating the initial schedule, where you communicate your availability, then give the participant a choice to accept and at what frequency.
- Communicate expectations. 

   At the beginning of the call or visit, let the participant know how much time you have to speak (i.e.1 hour). 10-15 minutes before you need to leave, remind the participant what time the call or visit needs to end.
  - If a volunteer has a planned activity that will interrupt a future scheduled call or visit, let the participant know a few calls or visits before the interruption, repeating the reminder on each contact leading up to it. ○ If you need to unexpectedly miss a scheduled call or visit, do your best to inform the participant beforehand, apologize, and confirm the next scheduled contact. You could also call MHAfred with the update in case the participant reaches out to the Senior Visitor Lead.
- Stay within your role as a Senior Visitors Volunteer, which is socialization. You are not a crisis worker, a caseworker, a home health worker, a personal aide, or a caregiver. A participant needing these resources should refer to the Quick References guide prepared by MHAfred or the <u>Senior Resource Guide</u> published by Healthy Generation for a more comprehensive listing. (The participant was

given hard copies of both resources when they enrolled in Senior Visitors. However, the most recent versions will be available online, and some participants may need help with access.) If the volunteer assisted a participant or needs additional help finding resources, they should email the Senior Visitors Lead.

#### **Practicing Mental Wellness**

"Self-Care" Definition:

- The practice of taking action to preserve or improve one's health.
- The method of taking an active role in protecting one's well-being and happiness during periods of stress.

The above definition from Oxford Languages illustrates self-care as a repetitive practice with a clear goal: preserving health, well-being, and happiness. In Senior Visitors, "health" includes physical and mental health.

Some mental wellness practices are automatic, such as eating when you're hungry or hydrating when you're thirsty. Other mental wellness activities must be practiced more deliberately to care for mental, emotional, and physical health. While these activities are different for everyone, common ones include:

- Physical exercise, stretching, or movement.
- Mindfulness or meditation.
- Getting enough sleep.
- Eating nutritious food and drink.
- Meaningfully interacting with others.
- Spending time in nature.
- Practicing hobbies or activities that bring you joy.

Senior Visitors prioritizes mental wellness because supporting another person can be stressful, particularly when that person experiences difficult times. While the volunteer's role is to offer socialization to participants, Senior Visitors is also here to support you as you navigate your mental wellness.

We encourage you:

- To use monthly volunteer meetings as a mental wellness opportunity. Check in with the group about how you are doing.
- To periodically pause and consider your own needs.
- To check in on your mental health. Mental health conditions are real, common, and treatable – and recovery is possible. Online screening is a quick and easy way to determine whether you are experiencing symptoms of a mental health condition. <u>A</u> <u>free screening is available at Mental Health America</u>.

(screening.mhanational.org/screening-tools/) Additionally, MHAfred's <u>HELPLINE</u> <u>service</u> is available by calling (540) 371-2704 or emailing <u>helpline@mhafred.org</u> if you are considering finding a mental health provider. • To recognize when you need a break. We understand and support your decision. See the "Ending Volunteer Service" section (page 15) for more information on taking a leave of absence or resigning from volunteer service.

	WORKSHEET:         WHEN MANAGING STRESS IS HARD         Making changes to how you handle stress can be hard. Really hard. Here are some questions to think about that might help get you started.
	What do you want to change about you manage stress?
	What are the negative effects of how you currently handle stress? Are they getting in the way of living your life the way you want?
	If you made changes now, how would life get better?
	What has worked before to help you make and keep changes to your lifestyle?
	What is one thing you can do during a defined period of time (one day/one week/one month/a few months) to start making the changes to how you deal with stress that you mentioned in question number one? If you need ideas, check out www.mentalhealthamerica.net/challenge.
	Who or what can help you stay accountable to yourself? This can be someone who is working on changes with you or reminding you to stay on track. It could also be an app or wearable device that helps you track things.
	How can you break up your goal into smaller milestones? How can you reward yourself for reaching these milestones?
struggling with yo your symptoms. It's free, confiden	steps to live a healthy lifestyle but still feel like you are bur mental health, visit www.mhascreening.org to check tial, and anonymous. Once you have your results, we'll ion and help you find tools and resources to feel better.



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#### **Cost of Waiting Until Stage 4**

Like any other chronic condition, mental health conditions can get worse if left untreated. This often results in crisis events like inability to work, hospitalization, homelessness or incarceration.

The good news is, mental health conditions are not only common, they are treatable – especially when they are treated early. There are a variety of treatment options ranging from talk therapy to medication to peer support. The earlier we treat mental health conditions, the easier it is for people to recover and the less it costs.

Early-----Late



## **Senior Visitors Procedures**

#### **Volunteers Giving Gifts**

- Lending or gifting money, including gift cards, is prohibited.
- Volunteers are not required to incur any expenses on behalf of the participant they visit. If you choose to incur an expense:
  - Any gifts you wish to give should be limited to lower-cost items. Keep it small (under \$10) or something homemade. Also, consider that correspondence such as birthday and other occasion cards are greatly appreciated by participants.
  - Due to their role, volunteers should not expect a reciprocal gift exchange with participants.
  - There is no obligation for participants to accept gifts from volunteers. Please be responsive if the participant wishes not to accept a gift and agree to that desire.

#### Volunteers Receiving Gifts from

**Participants** • Lending or gifting money is not allowed.

- As a volunteer with Senior Visitors, you are **prohibited** from accepting cash or service gifts from your participant. This includes but is not limited to:
  - o Gift cards or cash.
  - o The participant pays for you when you do something together.

o There is no obligation for participants to provide volunteers with tangible gifts. However, if gifting is done, accept only items of nominal value (\$10 or less).

#### "No Answer" Procedures

When a participant doesn't answer your scheduled call or visit:

- 1. Leave a voicemail, if possible.
  - a. i.e. "Hi this is *name*, calling for our scheduled call/visit. I hope all is well with you. I'll try reaching you again on *date*.
  - b. If their voicemail box is full and you have agreed to text or email each other, send a note with the above information instead.
  - c. If there is no way to leave a voicemail, text, or email, skip this step and go right to #2.
- 2. Try calling them again on the next date that you're scheduled to connect.
  - a. It is important that we respect our participant's right to decline phone calls, so please refrain from texting or calling them beyond step 1 before your next scheduled contact."
  - b. Please note that this procedure may change based on the participant's needs (i.e. hard of hearing may require several calls to answer or you may have a different point of contact that you need to call to reschedule an appointment).

If you notice your participant missing calls regularly, ask them what we can do to make the call or visit more accessible/convenient for them.

3. If you are unable to get ahold of a participant for two weeks or more, alert the Senior Visitors Lead. We will work together to review the situation and decide on next steps. Please note that it is not the volunteer's role to call the police for a welfare check.

#### Emergency procedures

If a participant appears to be experiencing an emergency (defined below), let them know that you care about them and encourage them to contact professional help. You can do this by:

- Offering to call their emergency contact. (Each participant will complete a referral form which will include 1-2 emergency contacts. When you are matched with a participant, you will be given these contacts. You should have them in your phone or easily accessible when you are visiting your participant.)
- Should the participant experience a high concern incident or life-threatening emergency, get professional help immediately. 

   Let the participant know that you are calling emergency services on their behalf to request that they come to the participant's location.
  - If you are on a call with the participant and you need to hang up to call for emergency services, call the participant back to let them know that help is on the way.

There are different emergency numbers for physical emergencies and mental health crisis. **Never diagnose, medicate, or attempt to physically move the person.** 

#### Physical Emergency: Call 9-1-1

If a participant is experiencing any of the following, it could be a sign of a medical emergency.

- Unconscious
- Labored breathing
- Bleeding
- Severe disorientation
- Sweating, pallor, complaints of unexplained pain.
- If you suspect that your participant is experiencing an overdose from drugs, medications, alcohol, call 9-1-1.

#### Mental Health Crisis: Call 9-8-8

A mental health crisis is defined as a time of intense difficulty, trouble, or danger. If your participant is experiencing any of the following, it could be a sign of a mental health crisis.

- Severe disruptive behaviors
- Aggressive or threatening behaviors
- Self-injurious behaviors

- Acute psychosis (Possible symptoms include delusions, hallucinations, talking incoherently, and agitation. The person with the condition usually isn't aware of their behavior)
- Suicide or suicidal thoughts
- Threats to harm self or others

Remember to contact the Senior Visitors Lead immediately to report any referrals to either 9-1-1 or 9-8-8 services. Call MHAfred's office number (540) 371-2704, and if no one answers or it is outside of business hours, leave a message.

#### **Reporting Incidents**

Please contact the Senior Visitors Lead immediately in case of any injury, incident, or accident. (While volunteering for MHAfred driving is prohibited. Therefore, vehicle accidents should not occur.) Further, MHAfred staff are required to report to our Executive Director any incidents involving participants or volunteers as soon as possible and no later than 24 business hours after the incident.

#### **Reporting Abuse and Neglect**

If you have knowledge or suspect that abuse, neglect, or exploitation has occurred, please call MHAfred at (540) 371-2704 to report to the Senior Visitors Lead or Executive Director what you see, hear, or smell. We'll take it from there. It takes a community response to effectively confront older adult abuse. Together, we can be the lifeline for vulnerable older adults.

#### Evaluation

Satisfaction surveys will be conducted with participants at several points during engagement with a volunteer: 6 months, and annually thereafter.

- With the participant's permission, staff will share relevant feedback with the volunteer.
- Staff will also share generalized participant feedback with all volunteers during monthly meetings.

Volunteers will be surveyed about their experience with the program annually. Additionally, a brief exit interview will be conducted with the Executive Director when a volunteer leaves Senior Visitors.

## **Ending Your Volunteer Service**

#### With a Senior Visitors Participant

If you need to discontinue a connection with a participant for any reason (short-term or long-term), let the Senior Visitors Lead know as soon as possible so we can work together to support the participant in your absence. Ideally, MHAfred strives to inform

the participant about a volunteer's leave of absence or resignation 2-3 weeks before it takes effect.

This process will:

- Give the participant time to receive and digest the news with the volunteer during the last scheduled calls or visits.
- Allow the volunteer to assist the participant in creating a plan for continued support. Based on the participant's preference, this plan may or may not include a new volunteer with Senior Visitors.
- Give staff time to find a suitable volunteer replacement if one is requested.

#### Volunteer Support Becomes Friendship

Sometimes relationships move beyond that of a volunteer and participant to a lasting friendship. While it is expected to be friendly with participants, you are responsible as a volunteer to let the Senior Visitors Lead know if the relationship extends beyond program expectations and policies. For example, don't hesitate to contact the Senior Visitors Lead for guidance if the program requirements are straining the relationship. A celebrated outcome is when individuals have found a forever friend through Senior Visitors.

#### Adult Protective Services

When a participant becomes the subject of an Adult Protective Services investigation, the MHAfred Executive Director will contact the volunteer, and the volunteer may be asked to take a leave of absence while the investigation is pending.

#### Termination

Volunteers who choose to discontinue their service can submit their intention in writing or email to MHAfred Senior Visitors Lead or the Executive Director.

Volunteers who choose to discontinue their service can submit their intention in writing or email to MHAfred Senior Visitors Lead or the Executive Director.

A volunteer can be subject to removal from Senior Visitors by MHAfred if they do not adhere to policies and procedures such as:

- Needing to sign the annual agreement.
- · Needing to attend monthly meetings.
- Required reports still need to be completed.
- Driving while volunteering for Senior Visitors. (Time going to and from meeting with a participant excludes volunteer hours. Further, volunteers may not drive participants or run errands.)

#### Exit Interview

A brief exit interview will be conducted with the Executive Director when a volunteer discontinues their volunteer service. Volunteers are encouraged to provide honest feedback so the program can continue to learn and grow.

## **Quick References**

Staff Member	Phone Number	Email
Hailey Jobin	(540) 371-2704	Haileyjobin@mhafred.org
Helpline Lead	(540) 371-2704	Helpline@mhafred.org

#### Office location/Mailing address:

Mental Health America Fredericksburg Region 150 Olde Greenwich Dr., Suite 102 Fredericksburg, VA 22408

## Community Agencies Commonly Referred to for Resources/Assistance:

Name	Contact/Number	Resources
Healthy Generations Area Agency on Aging	(540) 371-3375	Transportation Guide, Mobility Options, Senior Café, Homemaker Services, Home Delivered Meals, and more
disAbility Resource Center	(540) 373-2559	Durable medical equipment through Equipment Connection, assistive technology for hearing or vision issues, and more
Rappahannock United Way	(540) 373-0041	Prosper Tax Services, financial, prescription, and transportation services
Partners in Aging		Betty Bazemore Respite Grant
Virginia Department of Veterans Services	(540) 376-7298	Assistance and support for veterans.
Alzheimer's Association (Greater Richmond Chapter)	(804) 967- 2580	Educational information and caregiver support groups.
Caroline County Social Services	(804) 633-5071	

Fredericksburg Social	(540) 372-1032	
Services		
King George Social Services	(540) 775-7181	
Spotsylvania County Social	(540) 507-7898	
Services		
Stafford County Social	(540) 658-8720	
Services		

## **Monthly Volunteer Meetings**

Monthly small group volunteer meetings will be held for volunteers to discuss concerns, successes, or just collaborate with other volunteers.

Each monthly volunteer group meeting will include a brief presentation by the Senior Visitor Lead covering a component from initial volunteer training or pertinent topic as needed.

Meetings will be scheduled to last one hour. Multiple dates and times will be available each month in an effort to accommodate everyone's schedule. A volunteer only needs to attend ONE of those meeting times during the month.

Month	Meeting Dates	
January	January 14, 2024, 7 p.m.	January 18, 2024, 9 a.m.
February	February 11, 2024, 7 p.m.	February 15, 2024, 9 a.m.
March	March 11, 2024, 7 p.m.	March 15, 2024, 9 a.m.
April	April 8, 2024, 7 p.m.	April 12, 2024, 9 a.m.
		(In Person and Online)
Мау	May 13, 2024, 7 p.m.	May 17, 2024, 9 a.m.
June	June 10, 2024, 7 p.m.	June 14, 2024, 9 a.m.
July	July 8, 2024, 7 p.m.	July 12, 2024, 9 a.m.
August	August 12, 2024, 7 p.m.	August 16, 2024, 9 a.m.
September	September 9, 2024, 7 p.m.	September 13, 2024, 9 a.m.
October	October 14, 2024, 7 p.m.	October 18, 2024, 9 a.m.
November	November 11, 2024, 7 p.m.	November 15, 2024, 9 a.m.
December	December 9, 2024, 7 p.m.	December 13, 2024, 9 a.m.

Meeting dates, times, and locations are listed below.

Meeting Location:

Meetings will be held virtually through Microsoft Teams.

A link to the meeting will be sent each month before the meeting.

For assistance with how to use Teams, please contact the Senior Visitors Lead.