SDSU | Center for Excellence in Aging & Longevity

Community CallHub Volunteer Handbook

Welcome to the SDSU Center for Excellence in Aging & Longevity's Community CallHub!

Dear Volunteer,

Thank you for joining our initiative to foster meaningful connections between generations. This handbook is designed to clarify the policies and procedures for San Diego State University Center for Excellence in Aging & Longevity's (CEAL) volunteers and provide guidance on your role in this impactful program

The Community CallHub began as a pilot program in Spring 2024, initially known as the Intergenerational CallHub. This pilot focused on connecting SDSU students with socially isolated older adults. The results revealed that both older adults and students experienced significant benefits from brief, weekly, phone-based conversations.

Social isolation is a significant public health concern. Research consistently shows that intergenerational connections:

- *Reduce social isolation and loneliness*
- *Combat ageism and stereotypes*
- *Increase sense of purpose and well-being*
- *Create valuable learning opportunities for both younger and older participants*

The CallHub provides a structured environment where volunteers and older adults can engage in regular phone calls that offer companionship and emotional support. By bridging the generational divide, this program enhances social well-being and cultivates a deeper sense of community. CEAL remains committed to combining research with practice to ensure the CallHub is both impactful and scalable.

Thank you for being a part of this important work--we are excited to have you on board!

CEAL's Community CallHub

In February 2025, the Intergenerational CallHub was honored with the Program of Merit award from Generations United, placing it among an elite group of recognized intergenerational programs.

Check out these resources from CEAL

- **Issue Brief: Insights from the Intergenerational CallHub Pilot (Published: October 2024)**

- **Webinar: Connecting Generations: The Benefits of an Intergenerational CallHub to Address Social Isolation**

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Mission & Vision

Mission

The Community CallHub fosters meaningful connections between generations by pairing student and community volunteers with older adults for regular social phone calls.

Vision

Reduce social isolation and loneliness, challenge age-related stereotypes, and create opportunities for mutual learning and support via meaningful, intergenerational connections.

Who We Serve

The Community CallHub connects two key populations: **Companions and Callers.**

Companions are individuals aged 55 and older who have requested regular calls for companionship, conversation, and the opportunity to build meaningful connections. These individuals are typically members of the community who may benefit from reducing social isolation and strengthening their social networks.

Callers are volunteers who engage with Companions through phone calls. Callers fall into three categories:

- Older Adults doing peer-to-peer outreach, offering support and sharing experiences with other older adults.
- SDSU Students who connect with older adults to gain new perspectives, share stories, and create meaningful, intergenerational bonds.
- Community Members who volunteer to engage with older adults and contribute to strengthening social connections within their local community.

Through these connections, we work to bridge generational divides, enhance well-being, and foster lasting relationships across age groups.

Volunteer Training Checklist

As part of your training for the Community Call Hub, please complete the following steps:

- **Complete the Intake Survey:** Fill out the intake survey that will be sent to you from the CallHub platform. This helps us understand your preferences, match you with an older adult, and ensure a positive volunteer experience.
- **Review the Volunteer Handbook:** Familiarize yourself with policies, procedures, and expectations for your role.
- **Watch the Training Videos:** Watch the assigned training videos to deepen your understanding of best practices and program goals. These videos will be emailed to you by the program coordinator.
    - Active listening
        - 4 Things All Great Listeners Know
        - Active Listening: How to be a Great Listener
    - Open-ended questioning
    - Elder Abuse: Causes, Consequences, and Prevention (Watch from time marker 7:30-48:00 minutes)

- **Attend Orientation**: Participate in the mandatory orientation session, which occurs monthly on Zoom, to meet the team and learn more about the Call Hub structure and your responsibilities. Register on CEAL's website.

Finally, Sign the Volunteer Agreement. This agreement will be sent to you by the program coordinator and states you have completed all of the assigned Checklist Items.

Optional:
Attend a monthly Volunteer Check-In with the Program Coordinator and fellow volunteers via Zoom. This informal 'office hours' session provides an opportunity to discuss positive or challenging experiences with the platform, share insights from conversations, or simply connect with others.
See the CEAL Website for Office Hours, which will be held on Zoom.

Volunteer Roles & Expectations

As a volunteer, you play an essential role in the Call Hub! The following guidelines outline your responsibilities:

Time Commitment

- Volunteers are expected to commit to a minimum of 4 months of service. If you are unable to maintain weekly calls or if circumstances change that affect your ability to volunteer, please notify the Program Coordinator as soon as possible.

Call Expectations

- **Call Length:** Calls may vary in length, but ideally, they should last at least 15 minutes.
  - The number of companions you are paired with and the frequency of your calls will be discussed and negotiated based on your preferences and availability. This will impact how much time you volunteer weekly.
- **Scheduling Calls:** Companions and callers should agree on a regular time for weekly calls. This helps establish routine and ensures the calls are part of the companion's schedule.
- **Missed Calls:** If a call is missed, callers are expected to attempt to reconnect twice. When leaving a voicemail, please include details on when you will attempt to call again (preferably at the same time the following week).
- **Vacation/Time Off:** If you anticipate being unavailable for a week (e.g., vacation, time off), please inform your companion in advance. This ensures continuity and helps manage expectations.

Professionalism & Communication

- Maintain professionalism in all interactions. Be respectful, listen actively, and engage in conversations that are positive and supportive. Keep in mind that you may be working with people from diverse backgrounds, so approach each call with sensitivity and empathy.

- See Communication Best Practices & Code of Conduct for more information.

Confidentiality & Privacy

As a volunteer, you are entrusted with sensitive information and must respect the privacy of all participants. While this program does not fall under HIPAA regulations, volunteers should still adhere to similar standards of confidentiality. This means:

- **Respect for Personal Information:** Do not share personal details or sensitive information about companions outside of the program without explicit consent.
- **Confidential Conversations:** Maintain discretion regarding anything shared during calls. Avoid discussing personal conversations with others unless it involves necessary reporting or support.
- **Data Protection:** If you are provided with any written records or contact details, ensure they are kept secure and are only used for the purpose of the program.

By maintaining confidentiality, you help create a safe and respectful environment for everyone involved.

Policies and Procedures

Call Hub Structure

This program is a collaboration between SDSU CEAL and Determined Health, whose expertise in combating social isolation and promoting intergenerational connections helped lay the foundation for this initiative. Their innovative Connection1st CallHub platform, combined with training on social calling protocols, ensures effective engagement for volunteers and participants alike.

Application Process

Both Companions and Callers must submit an application online through CEAL's website. After submitting the application, there will be a screening process for Callers and Companions. Once selected, volunteers will complete the necessary steps for onboarding, which include reviewing program guidelines and completing. Subsequently, the Caller will be matched with a Companion.

Caller and Call Recipient Matching

- Companions and Caller matches are made based on personal interests and logistical preferences (e.g. time of day for calls, frequency of calls).
- Companions are expecting a social call from a volunteer and understand these are not medical or social work check-ins.

Making the Call: Connect in 6 simple steps!

1. To place a call to a Companion, Callers will dial +1 (619) 597-1010.
2. Enter your 4-digit personal PIN number.
3. You will then hear a menu option to select the person you have been assigned to call. For example, "To connect with (companion's name), press 1."
4. Once you select the correct number, the call will be connected. Call recipient will answer the phone. All calls come from CEAL CallHub: 619-******* showing on caller ID.
5. At the end of your call, you will receive an automatic email or text message from the Call Hub asking about your call. This is an opportunity to report any concerns that may have arisen during the call.

Note: *All calls are logged, including date, time and duration, and are available to the program manager to ensure everyone who wants a call receives one.*

The Connection1st Platform

The Connection1st CallHub platform is a secure and innovative tool designed to facilitate connections between callers and companions without sharing personal phone numbers or contact information.

Key features of the platform include:

- **Secure Connections:** Callers and companions are matched and connected through the platform without the need to share phone numbers or personal contact information.
- **Data Management:** The program manager has the ability to store and manage participant information, such as phone numbers and email addresses, within the system, ensuring data privacy.
- **Call Tracking:** The platform allows the program manager to track call logistics, including the frequency and length of calls, ensuring that calls meet the program's standards.
- **Communication Tools:** The program manager can send email blasts, updates, and surveys to participants.

This platform enhances the volunteer experience by making the connection process simple and secure, allowing for smooth, consistent engagement between callers and companions.

Communication Best Practices

Active Listening

Active listening involves fully focusing, understanding, responding, and remembering what the other person is saying. It is a way to show that you value and respect the speaker, ensuring they feel heard and understood.

Active Listening Examples	Not Active Listening
Give Your Full Attention Focus on the speaker without distractions. This shows respect and allows you to understand what's being said.	**Don't Interrupt** Resist the urge to speak over the other person. Interrupting shows that you aren't valuing their perspective.
Ask Clarifying Questions If you don't understand something, ask questions to make sure you fully grasp the message.	**Don't Judge or Criticize** Avoid forming judgments or giving unsolicited advice before fully understanding the speaker's message.
Paraphrase or Summarize Reflect back what you've heard in your own words to ensure understanding.	**Don't Get Distracted** Avoid multitasking or letting your attention wander when someone is speaking.
Use Verbal Cues Provide short verbal affirmations like "I see," "Interesting," or "I understand" to show you are following along.	**Don't Offer Solutions Unless Asked** Sometimes the speaker just wants to be heard, not advised. Unless they ask for guidance, refrain from suggesting fixes.
Be Patient and Let Them Finish Give the speaker time to express themselves without interrupting or rushing them.	**Don't Assume or Jump to Conclusions** Avoid making assumptions about what the speaker is going to say or how they feel. Wait until they've finished before forming conclusions.
	Don't Focus on Your Response While They're Talking Concentrate on what they are saying instead of thinking about what you'll say next.

Communication Best Practices

Safety & Reporting Protocols

To ensure a safe and positive experience for both callers and companions, volunteers must adhere to clear guidelines on conversation topics, boundaries & entanglements, and reporting procedures.

Communication Topics

Appropriate topics:

- Lighthearted conversations about hobbies, interests, current events, and shared experiences.
- General well-being check-ins (e.g., "How has your week been?" or "What's something fun you've done recently?").
- Neutral topics such as books, music, movies, and past experiences.

Topics to Avoid:

- **Medical, financial, or legal advice: Vo**lunteers are not in the role of healthcare professionals, social workers, or financial advisors when volunteering with CallHub and should not provide guidance in these areas.
  - If the conversation steers in this direction, remind your Companion that your call is strictly for social connection, but if they have a particular concern they can reach out to the Program Coordinator and that you will forward their information to the appropriate resource.
- **Controversial or divisive topics:** Use your best judgment when discussing sensitive subjects. While we aim to match pairs based on common interests, we all come from diverse backgrounds and perspectives. Topics such as politics, religion, or personal struggles should be approached with curiosity, respect, and consideration, or avoided entirely if they may cause discomfort.
  - If a topic feels too personal or uncomfortable, whether for you or your Companion, gently steer the conversation toward shared interests and positive, engaging discussions.
- **Solicitation or personal favors:** Callers and Companions may not ask for or offer money, gifts, or services.
  - If your companion is in need of a specific service or resource, please contact Program Coordinator or fill out in the post-call survey.

Maintaining Boundaries & Avoiding Entanglements

Volunteers should aim to create a warm and engaging environment while maintaining a clear distinction between social connection and personal involvement. While it's natural to build rapport over time, it's important to avoid forming overly dependent relationships where either party feels an obligation beyond the scope of the program.

Setting boundaries can feel uncomfortable, especially if it's not something you're used to. Here are some helpful strategies to establish and maintain clear, respectful boundaries.

During your first call, take a moment to set expectations by establishing the nature of your interactions. Let your Companion know that your role is to offer friendly conversation and social connection, but that communication will remain within the program's guidelines.

Example:
"Hi [Companion's Name], this is [Your Name]! I'm a volunteer with the Intergenerational CallHub, and I'm really excited to connect with you. How are you doing today? Before we dive in, I just want to share a little about how this program works. These calls are all about having a friendly chat, sharing stories, and staying socially connected. Just so you know, our calls will always take place through this program, and I won't be able to share personal contact information like phone numbers or social media. But I look forward to getting to know you through our conversations here!"

- **What is a Boundary?**
  A clear and respectful limit that defines what is appropriate in a relationship or interaction, ensuring mutual comfort and well-being.
- **What is Entanglement?**
  An overly personal or dependent relationship that blurs professional or social boundaries, making it difficult to maintain appropriate roles and objectivity.

Tips for Maintaining Healthy Boundaries

Volunteers should keep interactions friendly but professional.

Avoid sharing personal contact information such as phone numbers, addresses, or social media accounts. All communication should take place through the Connection1st CallHub platform to maintain privacy.

If a call recipient asks for help beyond social connection (e.g., assistance with errands, financial support, or counseling), redirect them to appropriate community resources and inform the Program Coordinator.

Refer to the Community CallHub Program's Guidelines if you ever feel uncomfortable or uncertain during a conversation.

- *"I appreciate you wanting to stay in touch outside of this, but for privacy reasons and the program's guidelines, we need to keep our conversations here. I'm happy to keep connecting this way!"*

Use "I" statements if you need to redirect or change the topic. Sometimes saying "You" can come across negatively.

- Example:

"You should stop talking about that and focus on something more positive. Let's talk about something fun instead."

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"I prefer to keep our chats focused on positive topics, so let's talk about something fun we both enjoy."

More Communication Tips

The Five C's for an Effective Call

Helpful Conversation Starters

Try a few of these and see where the conversation goes:

- Tell me about you
- What was the highlight of your day/week? Why?
- What was your least favorite part of the week? Why?
- Share with me about what you've been watching/reading/listening to.
- Tell be about what you had for dinner last night?
- How did you come to live where you are today?
- Tell me about your friends/family/pets.
- How do you like to spend your free time?
- Do you have any hobbies or special interests? Tell me more.

More Communication Tips

Establish Boundaries — Discuss frequency and length of calls.

Report incidents and concerns — Staff is available to help you!

Use active listening skills — Make sure the participant feels heard.

Be tolerant — People may be forgetful or have values that differ from your own.

Be patient and perceptive — Grieving or ill adults may have strong feelings or function at a slower rate.

Express concern — Let the person know that you care.

Keep a sense of humor — Laughter heals.

Be honest — But tell the truth in a kind and gentle way.

Be consistent and dependable — The participant is counting on you!

Be creative — Seek points of interest to jumpstart conversations.

Be flexible — Schedules change, and participants are not always up for conversation.

Get involved in family conflits — Listen and support without taking sides.

Complain — It is fine to discuss your life, but don't focus on your problems.

Be overly polite — No one enjoys feeling patronized.

Tell participants what to do — Let them make their own decisions.

Accept money or gifts — Express gratitude and politely refuse.

Create over dependence — Look for ways to empower the participant.

Dispense Medicaiton — Never administer, share, or recommend medications, dietary supplements, etc.

Provide Transportation — Inform the staff if the participant needs transportation.

Share your contact information — Never share your address or home telephone number with participants.

Get involved in financial decisions — Avoid giving advice about money.

Meet in person — You will be required to exit the program if you decide to meet in person.

Handling Difficult Conversations

By following these protocols, you can ensure that difficult conversations are handled with care, conflicts are resolved constructively, and emergencies are responded to effectively and responsibly. If ever in doubt, do not hesitate to contact the program coordinator.

If a Call Becomes Emotionally Challenging

- **What to Do:**
  - Stay calm and empathetic. Acknowledge the emotions without judgment.
  - Listen actively without interrupting, and give the person space to express their feelings.
  - Use validation: "I hear that you're feeling [emotion], that sounds really tough."
  - Redirect if necessary to avoid overwhelming the caller or getting stuck on negative emotions.
- **How to Redirect Conversations:**
  - Introduce a neutral topic: "I understand how you feel. Let's talk about something that might bring a little light. What's something you've enjoyed recently?"
  - Redirect to shared positive interests: "I'd love to hear more about [hobby, activity, or interest] that brings you joy. Can you tell me about it?"
  - Suggest positive future-focused topics: "What's something you're looking forward to, even if it's small?"

Conflict Resolution

Steps for Handling Conflicts with Participants

- Step 1: Stay Calm and Listen
  - "I hear you, and I want to understand your perspective fully."
- Step 2: Acknowledge the Issue
  - "It seems like there's been a misunderstanding, and I want to make sure we work through this."
- Step 3: Reframe or Clarify
  - "It looks like there's some confusion about [specific issue]. Let me clarify what I meant."
- Step 4: Find a Resolution or Compromise
  - "How can we find a way forward together? Let's agree on [specific solution]."
- Step 5: If Unresolved, Involve a Program Manager
  - "I think it would be best if we involve the Program Manager to ensure we resolve this properly."

Emergency Protocol

Emergency Protocol

If a Caller expresses distress, abuse, or medical Emergencies

- Stay Calm and Reassure: Keep the caller on the line and remain supportive.

  "I'm really sorry you're feeling this way. Let's talk through this together."

- **For Suspected Suicide or Immediate Danger:**
  - Keep the individual on the line and remain calm and engaged.
  - Redirect them to the appropriate resource: *"It sounds like you're going through something really serious. I'm going to connect you with someone who can provide the support you need."*
    - If needed, contact the Suicide Prevention Helpline immediately. *Call 1-800-273-8255* (or local crisis line)
    - Contact the Program Manager: Immediately inform your Program Manager to report the situation and seek further support

For Abuse or Safety Concerns

- Remind the participant that you will connect them with the proper resources.

  "I understand you're facing some very difficult situations, and I want to make sure you get the help you need. I'm going to make sure you're connected to someone who can assist you with that."

- Contact your Program Manager immediately after the call to report the concern and ensure the appropriate follow-up.

Code of Conduct

Respect & Inclusivity

Volunteers are expected to treat all participants with dignity and respect. Every individual, regardless of their age, background, or life experiences, deserves to be heard and valued. We emphasize creating a welcoming, inclusive environment where everyone can feel safe and appreciated.

Non-Discrimination Policy

The program has a zero tolerance policy for any form of discrimination, including racism, sexism, ageism, or any other bias based on gender, sexual orientation, race, religion, ability, or any other characteristic. Volunteers must ensure that all interactions are free from discriminatory behavior and language. It is crucial to create an environment where all participants feel accepted and supported.

Ethical Considerations

Volunteers should adhere to ethical standards, including:

- No exchanging money or providing financial support to any participant.
- Avoid forming personal relationships outside of the program. The focus of the CallHub is on social connection within the boundaries of the program's guidelines.
- Maintain professional boundaries at all times.

SDSU Students must adhere to the Student Code of Conduct:

41301, Title 5, California Code of Regulations

(a) Campus Community Values

The university is committed to maintaining a safe and healthy living and learning environment for students, faculty, and staff. Each member of the campus community should choose behaviors that contribute toward this end. Students are expected to be good citizens and to engage in responsible behaviors that reflect well upon their university, to be civil to one another and to others in the campus community, and contribute positively to student and university life.

(b) Grounds for Student Discipline

Student behavior that is not consistent with the Student Conduct Code is addressed through an educational process designed to promote safety and good citizenship and, when necessary, impose appropriate consequences.

Program Evaluation

The Community CallHub program will be regularly evaluated to assess both impact and fidelity. This ongoing evaluation ensures the program is meeting its goals of reducing loneliness and fostering meaningful intergenerational connections.

To evaluate the effectiveness of the program, both Callers and Companions will receive a survey at the start of the program and then every four months. The survey will assess:

- Engagement with the program, including satisfaction with calls and connection quality.
- Loneliness and social isolation levels, helping us track changes in participants' emotional well-being.
- Program improvement feedback, providing insights into what is working well and what could be enhanced.

The feedback gathered will be used to inform program improvements and ensure that the CallHub remains a valuable and effective resource for all participants. This ensures the program remains aligned with its mission of creating meaningful connections and combating social isolation.

Exit & Termination Policy

Resignation Process

- Volunteers who wish to step down from the program are asked to notify the Program Coordinator in writing at least two weeks in advance. This allows the team to make appropriate adjustments and ensure that the program can continue running smoothly. Volunteers can step down after a minimum of four months in the program to ensure continuity and support for companions.
- If a volunteer needs to resign before the four-month commitment is met, a conversation with the Program Coordinator will be required to discuss the reason for leaving and any potential impacts on the program or the volunteer's experience.

Dismissal Policy

- Grounds for Dismissal from the program may include:
  - Failure to meet the minimum time commitment (at least 4 months or agreed-upon number of calls per week).
  - Failure to adhere to the Code of Ethics and program guidelines, including confidentiality, respect, and professionalism.
  - Inappropriate behavior, including but not limited to disrespecting participants, violating privacy, or engaging in discriminatory or offensive conduct.
  - Incidents of elder abuse or any form of abuse toward the CallHub or participants will result in immediate dismissal from the program. This includes any form of manipulation, exploitation, or harm towards companions or fellow volunteers.
  - Repeated missed calls without prior notice or explanation, impacting the reliability and trust in the program.

Volunteer Agreement

By signing this Volunteer Agreement, I, the undersigned, agree to the following terms and conditions as a volunteer with the Community CallHub program:

1. Commitment to the Program

- I understand that as a volunteer, I am committing to the program for a minimum of four months. I agree to make regular calls as agreed upon with my assigned Companion and adhere to the program's expectations for frequency and duration of calls (at least 15 minutes per call, 1-2 calls per week).
- I agree to conduct myself in a professional and respectful manner during all interactions with companions and program staff. I will uphold the program's values of respect, inclusivity, and ethical behavior.

2. Confidentiality and Privacy

- I understand that, through my conversations with participants, I may become aware of personal information. I will respect each participant's privacy and maintain confidentiality at all times. I agree not to share or disclose any personal contact information, including phone numbers or addresses.
- I understand that this is a phone-call-only program designed to offer a simple and accessible way to connect. **In-person meetings are not part of this program and should not be initiated.** All interactions will take place over the phone through the designated platform, and the focus is on building friendly, supportive conversations remotely.

3. Program Guidelines and Policies

- I have read and understood the program's handbook, including the Volunteer Responsibilities, Code of Ethics, and the Dismissal Policy. I agree to adhere to these guidelines and policies, understanding that violations may result in dismissal from the program.

4. Resignation and Dismissal

- I understand that if I need to resign from the program before completing the required four months, I must inform the Program Coordinator at least two weeks in advance. I acknowledge that failure to meet program commitments or adhere to policies may result in dismissal from the program.

By signing below, I acknowledge that I have read, understood, and agree to abide by the terms and conditions outlined in this Volunteer Agreement.

Volunteer Name: _____

Signature: _____

Date: _____