



**Independent
Age**

A portrait of a middle-aged man with short, graying hair and a beard, wearing black-rimmed glasses and a blue and white plaid button-down shirt. He is looking directly at the camera with a slight smile. The background is a blurred green, suggesting an outdoor setting.

Telephone Group
Facilitator handbook

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Introduction

We know what an incredible difference volunteering makes to the people that we support, so we really can't thank you enough for giving your time to be part of our work.

This handbook will help you to carry out your volunteering role with Independent Age. Please read it thoroughly and, if you have any questions, do get in touch with your Independent Age contact.

I would like to once again to thank you for joining Independent Age, so that we can help more people to live a happy, connected and purposeful later life.

Best wishes



Kelly Butler

Head of Volunteer Transformation



Volunteering at Independent Age

Whether performing an active role in their communities, increasing awareness, campaigning for change or raising funds, volunteers play an essential role in increasing our impact.

Our volunteers work in collaboration with our employees, bringing their skills, experience, passion and expertise to all areas of our work. We appreciate, support and celebrate our volunteers for their diversity and creativity.

Our volunteers increase our capacity and impact, enabling us to make sure that more people can grow old well, with dignity, choice and purpose. By working with our volunteers, we increase our reach to a wider range of communities across the UK.



Useful contacts

Volunteering

For general enquiries about your volunteering role

020 7605 4255 – Monday to Friday, 9am–5pm

volunteering@independentage.org

Useful documents for volunteers

independentage.org/get-involved/volunteering/volunteer-resources

Digital and Phone Services team

For all digital and phone services enquiries

020 7605 4265 – Monday to Friday, 9am–5pm

telephone.services@independentage.org

Helpline

For free confidential advice on issues that affect older people,
or to order our free guides

0800 319 6789 – Monday to Friday, 8.30am–6.30pm

advice@independentage.org

You can also order advice guides and find information and videos
at **independentage.org**

Safeguarding concerns

If you have a safeguarding concern about an older person you support, please let us know as soon as possible

Monday to Friday 9am–5pm – please call your Independent Age contact

Weekdays 5–9pm and weekends 9am–9pm – please call our out-of-hours safeguarding number **020 7605 4455**

Campaigning enquiries

For enquiries about how we campaign to improve the systems that people rely on as they get older

campaigns@independentage.org

Fundraising enquiries

For enquiries about donating or supporting our fundraising

020 7605 4223

supporters@independentage.org



Your role

About your Group Facilitator role

As a Group Facilitator, your role supports the work of our Digital and Phone Services team.

Our Digital and Phone Services team helps isolated older people to rebuild a fulfilling and independent social life and reduce feelings of loneliness. Independent Age's digital and phone services are designed to achieve positive change in the lives of older people by listening to what they need and by bringing them together with volunteers and other older people – so they feel better connected both socially and to other forms of practical help, advice and information.

As a Group Facilitator, you will support a group of older people regularly over the phone for friendly conversation, sharing and fun. You will be providing companionship, positive encouragement and ideas to help people establish new friends, enjoy new experiences and to make connections.



About Telephone Groups

Telephone Groups are free telephone-based social groups for over 65s. As a Group Facilitator, you will support a group of local older people over the phone for one group call a week. Your weekly calls will be at a set time, for one hour and between 10am and 6pm.

The groups are especially good for older people who struggle with feelings of loneliness or isolation, and who are perhaps without the internet, are housebound or are unable to engage in face-to-face activities.

Group calls help older people to build local connections with their peers, forging new friendships and tackling feelings of isolation and loneliness. You will facilitate a group of 5–7 older people, over six months, to enjoy friendly conversation and share experiences. After those six months, we will give you or your group's members the training or tools to manage friendships independent of us.

This may look like:

- you choosing to run the group separately from Independent Age, perhaps because you've found you've become close and want to continue being friends
- one of the group members running the group separately from Independent Age
- group members swapping contact details to stay in touch on a one-to-one basis
- group members meeting up in person.

You might also decide you'd like to take on a new group with us, which we'd be glad to chat about towards the end of your six months.

Our purpose as a charity is to help older people to live independent lives, so our groups run for a limited time to help people build those initial connections. After that we want to encourage independence and to move friendships into the real world. This also means we're able to steadily set up new groups across the country over time and can be the catalyst for thousands of older people to make new local friends.

The facilitator will... Which means...

Help the group to enjoy each other's company and make friends

- **Facilitating conversation** and helping people to share their views, experiences and opinions.
- Encouraging **constructive debate** between participants.
- **Shifting the conversation** if it's taken an unhelpful or negative direction.
- **Leading the first few calls** while group members get used to each other –but, in the longer term, encouraging the participants to take ownership of the group.
- **Encouraging quieter participants** to contribute and steering the talkative ones!

Manage group etiquette

- Discussing **group etiquette** on your first call, and whenever necessary.
- Being the person on the call who spots when something is going awry and brings it **back on track**.
- Flagging any **concerns** to your Independent Age contact.
- Using the mute button or **disconnecting the call or a caller** if necessary.
- Ensuring **confidentiality** is maintained and that safeguarding is a priority.
- Not allowing **abusive or discriminatory** behaviour.

The facilitator will... Which means...

Manage the practicalities and technicalities of the call

- **Keeping an eye on the time** during the call – they should only be an hour!
- **Dialling up group members** a couple of times if they do not answer immediately.
- **Recording any technical issues** to pass on to the team.
- **Reminding** the group to let Independent Age know if they can't attend the next call.

Keep Independent Age up to date

- Passing on any **concerns, problems or queries** to Independent Age as soon as possible so we can follow up and support you and the group.
- **Filling in a short report after each call**, which should take less than five minutes.
- Letting us know about **good news stories and positive things** happening in your group.
- Following the **safeguarding and duty of care** guidance outlined in this handbook.



Your training

- All our volunteers need to complete essential training to make sure you are confident and supported in your role.
- You will also be provided with platform training, so you can confidently run your calls.
- We want all volunteers to feel happy and confident in their role so, if there is any additional training that would be useful to you in your role, please let us know.

How we'll support you

- Your Independent Age contact will join you on your first group call to help you get set up.
- We'll drop into your group from time to time to say hello, or if you need support.
- Around four months into your work with the group, we'll start a conversation with you about how we can move the group to operating independently.

Tips to help you in your role

How to facilitate your group call

- **Plan your call** – check you're somewhere you won't be interrupted and, ahead of time, have a think about what you might discuss today.
- **Open your email** – you will receive a link from the telephone conferencing platform to take you through to the portal.
- **Have the right equipment** – when the telephone conferencing platform opens, you will be asked how you want to join and, here, you can select your headphone and microphone settings.
- **Join your call** – you'll hear some music while you prepare to dial people in.
- **Dial in your group members** – please don't dial people in until it is the beginning of the session.



- **Introduce yourself** – remind group members as they join that you're a volunteer at Independent Age and this is their regular group call. If you notice any delays in them responding, check that the line is clear and they can hear you well.
- **Be aware of how you speak** – you may need to speak more slowly than you usually do. Don't be afraid to say that someone's radio or television is up too loudly if you can't hear.
- **Recap on what you're there to do** – this is a group call and you're looking forward to hearing how everyone is today.
- **Try to involve everyone** – if a group member is quiet, try asking them a question directly or, if someone is being dominant, try to involve others and give them an opportunity to speak.
- **Actively listen** – show empathy, ask questions and get to know your group members.
- **Stay present throughout the call** – this is for safeguarding purposes, as well as for keeping the conversation moving along.
- **Don't close the platform** – this will end the call for everyone.
- **Let us know if you're having technical issues** – if you have any technical difficulties during the call, click the purple help button in the bottom right corner to chat live with technical support, or let us know on email and we'll try to resolve it as quickly as possible.
- **Say goodbye and remind** – at the end of the call, thank everyone for joining you and remind them of the time and date of the next call.
- **Complete your call log** – this is a quick log to let us know how the call went.
- **Be diligent with welfare and safeguarding** – if, during the group call any welfare or safeguarding concerns arose, please contact your Independent Age contact immediately.
- **Share with us** – we also love to hear about the wonderful discussions that take place, so please let us know if you'd like to share more about what your group is up to.



Tips for active listening

- Repeat, summarise, paraphrase.
- Ask questions.
- Remain focused on the person – it's fine to relate to their experiences but allow them to expand if they'd like to.
- Hear them talk more than you, assuming they want to!
- Allow some time for silence or reflection.
- Make encouraging noises and use encouraging words.

Supporting someone who is very emotional

There's often little you can say that's useful or helpful. The most important part is just your presence and your time.

- **Let them cry.** They are sharing a vulnerable moment with you, so allow them to express what needs to be expressed without telling them how to feel. Don't tell them to stop crying or that whatever they're crying about isn't worth their tears. Emotions vented are better than emotions stored inside.
- **Don't create solutions.** If the person is crying and upset about a situation, don't try to immediately solve the problem for them. It's more important for you to do less talking and more listening. Their crying is a way to express their emotions. Let them do so without interfering.
- **Don't try to instantly make the conversation positive.** It's a natural tendency to want to help the person feel better by having them look at the positive side. But, when you do that, they may feel like you are glossing over what's wrong and they may feel like their feelings aren't important.
- **Ask what they need.** Don't assume you know what they want. Asking what they want or need puts the other person in control and gives you the opportunity to listen and respond. Whatever they ask for or need, respect what they say.
- **Acknowledge your helplessness.** You could say: "I'm so sorry you're going through this. I don't really know what to say to make it better. I know no words really could. But I want you to know that I'm here for you when you need me."



If you have any concerns about a person's wellbeing, please share them as soon as you can with your Independent Age contact. Or, call our out-of-hours safeguarding number – **020 7605 4455** – from 5pm to 9pm on weekdays and 9am to 9pm on weekends.

What we expect from you – and you from us

Volunteers are essential to Independent Age, and we really appreciate that you've chosen to volunteer with us.

We want you to know that we will do our best to make your volunteer experience as enjoyable and rewarding as possible. Effective relationships are built on trust and mutual understanding and it's for that reason that we have developed the following agreement.

Our agreement with you aligns with Independent Age's values of being:

- **purpose-driven** – the experience, needs and views of older people are central to everything we do
- **compassionate** – we listen, care and take action
- **expert** – our work is evidence based and solution focused
- **collaborative** – we work in partnership to maximise our impact
- **accountable** – we work with integrity and transparency
- **inclusive** – we value diversity and always treat everyone fairly, and with dignity and respect.



Although this isn't a legally binding agreement, and both Independent Age and you as a volunteer can end our agreement at any time, we want to be clear from the start that there are some things that we'll ask and expect of you and that, equally, there are things you should ask and expect from us. Those things are:

We ask that you...

In return we will...

Are purpose-driven and strive to do your best to complete your volunteering activities with dedication and commitment.

Be inclusive and introduce you to how our organisation works and your role within it.

Go to any briefings and training that we think will help you in your role.

Use our expert knowledge to offer you relevant training and resources to support you in your role.

Be accountable and operate responsibly and within the law, following the policies and procedures of Independent Age, which include safeguarding, and health and safety, and report any concerns that occur.

Ensure your health, safety and welfare, give you information about Independent Age's policies and procedures, and provide relevant training to support you.

Be inclusive and adhere to our equity, diversity and inclusion statement.

Provide an opportunity to discuss what equity, diversity and inclusion means and how it relates to you in your role.

Maintain the confidentiality of Independent Age's activity and that of the people that we work with.

Provide you with our expert information relating to GDPR (see the next section, Data protection) and confidentiality best practice.

Be compassionate by valuing and respecting the rights of the people that we support.

Ensure that you have access to regular support yourself.

We ask that you...

Be collaborative and work in partnership with staff and other volunteers to achieve Independent Age's mission.

Let your volunteer manager know if you're having any problems or if you have any complaints, concerns or feedback.

If you volunteer to directly support an older person, we ask that you be accountable and remember that your role is about helping someone to develop their confidence and independence. In your role, it is important that you don't keep or use the keys to someone's home, that you don't provide medical, health or personal care, that you don't act as an advocate or power of attorney for someone, and that you don't act as a qualified therapist.

In return we will...

Be accountable and respectful and listen to your feedback, and keep you informed of any relevant changes.

We will be purpose-driven and strive to resolve any concerns fairly and reasonably, applying our complaints procedure when it's needed.

We will be expert and collaborative by providing you with advice and support to ensure that the people that we work with are referred to other relevant services to support their needs.

We hope that volunteering with Independent Age will be a fun, enjoyable and fulfilling experience. We'd like to thank you once again for choosing us.

Data protection

As an Independent Age volunteer, you may receive personal and sensitive information about the person or people you support to help you carry out your role properly. It is vital that this information is not shared with anyone unauthorised and that it is handled correctly, in line with GDPR Regulations 2018.

We have clear guidelines to ensure you fully understand how best to protect the data you have access to, which we ask you to read and sign when you start volunteering with us. You can also find these guidelines at **independentage.org/get-involved/volunteering/volunteer-resources**.

Any concerns about the person or people you're supporting should only be shared with your Independent Age contact, apart from some exceptions, such as when responding to a medical emergency or a situation where the person you support is at immediate risk of harm.

If you witness, are told about or accidentally disclose any information to others who should not be privy to that information, immediately report this to your Independent Age contact and our Information Governance team on **dp@independentage.org**.

Please remember to delete or securely destroy any notes you make or files you save that contain personal information you no longer need.

Equity, diversity and inclusion

This statement applies to everyone who may seek our support, and also to those who seek to support us in delivering our mission to ensure that as we grow older, we all have the opportunity to live well with dignity, choice and purpose. This includes the people who use our services, our staff, volunteers, partners, supporters and suppliers.

We celebrate diversity at Independent Age and champion the differences that make each of us unique. We all have the right to be treated fairly and equitably, regardless of our age, race, colour, ethnic or national heritage, sex, gender identity, sexual orientation, religion / non-religion or belief, marital / civil partnership status, disability or health, neurological differences, pregnancy or maternity / paternity status, parental or caring responsibilities, upbringing, or any other status.

We want everyone who uses our services and those who work for and with Independent Age to feel safe, protected, welcome and included. We expect everyone to treat each other with dignity and respect, and we will not tolerate any form of discriminatory behaviour or language from or towards our staff, volunteers, the people who use our services, partners, supporters, suppliers and anyone else we may directly engage through the course of our work. If this occurs, we will challenge them respectfully and take appropriate action, including potentially ending our relationship.

We hope you will help us in creating the respectful, equitable, inclusive environment we all want to enjoy life in, and in celebrating the rich diversity that exists across our nations.

Safeguarding

Your volunteering role may require you to work with people who are considered at risk of harm or abuse in the eyes of the law. We all have a duty to protect anyone who is at risk of harm or abuse: this is known as safeguarding. Safeguarding is everyone's responsibility. The training Independent Age provides will ensure you are well equipped to handle any concerns you have, and you will always be fully supported.

Please let your Independent Age contact know about any concerns you have about the person you're supporting. If anyone tells you of any type of abuse, remain calm, listen and reassure them that it will be taken seriously.

Don't promise confidentiality, because you will need to speak to your Independent Age contact, and they will need to take it forward. We also have an out-of-hours safeguarding number – **0207 605 4455** – to help you, which is available 5–9pm on weekdays and 9am–9pm on weekends.

You can find more detailed information about safeguarding on our dedicated pages for volunteers at **independentage.org/get-involved/volunteering/volunteer-resources**.

Lone working guidance

We want to ensure that everyone that volunteers for us can do so safely. One of the ways that we do this is to make sure that volunteers are staying safe if they are volunteering from home alone. This is called lone Working. A lone worker is defined as someone who regularly or occasionally works on their own without anyone else present, direct supervision or support. For example, someone who:

- Is volunteering from home alone
- Carries out activity alone in the community or someone else's home
- Travels on their own for volunteering purposes

In your volunteer role you will be predominantly volunteering in your home. Whilst we know that you are safe in your own home, there are just a few things to be aware of whilst you are volunteering:

- Ensure you have the number of your Independent Age contact to hand and that you can get in touch with us quickly if you need to report a concern or raise a query. If you are using a mobile phone, make sure that it is charged.
- If you are going to be seated for significant period for your volunteering, ensure that your chair is comfortable and supportive. Make sure you take regular breaks to move around and stretch your legs, particularly if you are using a computer screen
- If you are using a laptop or other piece of equipment, then ensure that any wires or cables are kept tidy and are not causing a trip hazard.
- Record and report any incidents that cause you concern immediately to your Independent Age Contact.
- Remember that we are here to support you and your health and wellbeing are important to us. If you encounter something in your volunteering whilst at home that is challenging or stressful then do let us know so that we can support you.

Remember we have the Out of Hours Safeguarding support number if you have any concerns about older people who access our services. This number is for outside of office hours (5–9pm on the weekdays and 9am–9pm on the weekends)

Out of Hours Safeguarding Support number: **020 7605 4455**

Problems with your volunteering

If you encounter difficulties in your volunteering role or just feel it isn't working out as you'd hoped, please talk to your Independent Age contact as soon as possible for advice and support. They will help you to work out any difficulties and, if required, find a more suitable volunteering role with us. Alternatively, you can contact our Volunteer team on **020 7605 4255**.

Sometimes, you may not be able to commit to your regular group call. If this is the case, **we ask that you give us at least 48 hours' notice** so we can try to arrange for another volunteer or a member of staff to cover the call. This isn't always possible, however, which is why it's really important to let us know if you can't make your session. The older people we work with look forward to their calls and will be disappointed if not given proper notice that a session cannot go ahead.

If you find that, during your volunteering role, you're struggling with your mental health for any reason, we encourage you to speak to your Independent Age contact in the first instance. You might also find it helpful to contact one of the organisations on the next page for support or advice.



Organisations that may be able to help

Samaritans

Emotional support day or night for anyone who needs someone to listen without judgement or pressure

116 123

jo@samaritans.org

samaritans.org

Mind

Mental health specialists, Mind provides advice and support to empower anyone experiencing a mental health problem

0300 123 3393

info@mind.org.uk

mind.org.uk

Anxiety UK

A user-led organisation, run by people with experience of living with anxiety, stress or anxiety-based depression, supported by a high-profile medical advisory panel

03444 775 774

07537 416 905 – text service



If you can't get hold of your Independent Age contact, call our out-of-hours number – **020 7605 4455** – from 5pm to 9pm on weekdays and 9am to 9pm on weekends.

What to do if...

What to do if someone doesn't answer your group call

If you can't get hold of them at the agreed time, try again in five minutes and then again in another 15 minutes

If the group member unexpectedly misses a session two weeks in a row, inform your Independent Age contact or call our out-of-hours safeguarding number – **020 7605 4455** – from 5pm to 9pm on weekdays and 9am to 9pm on weekends.

If the older person is at immediate risk – for example if there is a medical emergency – contact emergency services on **999**.

What to do if you are concerned about someone's wellbeing

If you're concerned about someone's wellbeing, let your Independent Age contact know as soon as possible, so they can look into appropriate support.



If you're concerned about someone's wellbeing outside working hours, please contact our out-of-hours support number – **020 7605 4455** – from 5pm to 9pm on weekdays and 9am to 9pm on weekends.







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020 7605 4200
charity@independentage.org
independentage.org
Helpline 0800 319 6789



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Royal United Kingdom Beneficent Association.
Registered charity number 210729
(England and Wales) SC047184 (Scotland).

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