

# Companionship Manual



## July 2025

For staff and volunteers

# **Companionship Manual**

For Staff and Volunteers | Age UK Norfolk

Registered Charity No. 1077097

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## **1. Introduction**

Age UK Norfolk was established in 1947. Today our mission is to make Norfolk a great place to grow older. We recognise that service standards are necessary to ensure consistent and quality services to the people to whom we provide help and support. This

Manual lays out the standards and processes that staff and volunteers within the Companionship service should follow in their everyday practice. It provides a comprehensive set of guidelines and procedures and is to be used as a tool for induction, training and as a reference document. This manual is an extension of organisational procedures and policies.

Staff and Volunteers are required to adhere to this manual; however, they are also encouraged to commit to continuous quality improvement and therefore questions, comments and suggestions are welcomed at any time. The service needs to remain responsive to changing demands and the manual is therefore subject to revision.

This manual will focus on the Gift of Friendship service, Telephone Befriending, Travel Companionship and our Care Home Befriending pilot we are running.

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## **2. Our Vision, Mission, Objectives and Strategic Priorities**

Age UK Norfolk aims to make Norfolk a great place to grow older. All Companionship projects fall under our “Community and Wellbeing” strategic priority. A copy of the organisational strategic priorities, along with our vision, mission and objectives can be found on our website.

[Vision, mission and objectives | Age UK Norfolk](#)

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## **3. Principles and Objectives of Companionship Services**







- Support older adults 50+ in Norfolk who are lonely, isolated, or lacking confidence.
  - Reduce feelings of loneliness and build confidence and social connections.
  - Respect individual rights, uphold dignity, and promote independence.
  - Believe that later life should be fulfilling, inclusive and an enjoyable experience.
  - Ensures fairness, equality, and respect for diversity, following Age UK Norfolk’s policies.
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## **4. Expectations and Limitations of the Services**

- Services are provided for individuals who are believed to have mental capacity.
- Confidentiality, clear boundaries, and safeguarding are core principles.
- Each service has limitations based on capacity, duration, and method of support (see project specific guidance in section 14).

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## 5. Staff Roles

					
<b>Jo Asbury</b> Head of Community & Wellbeing Services	<b>Frances Thorne</b> Community & Wellbeing Coordinator	<b>Lucy Toplis</b> Community & Wellbeing Assistant Manager & Coordinator	<b>Laura Hawkie-Chapman</b> HR and Service Support Officer	<b>Lisa Hodges</b> Community & Wellbeing Coordinator	<b>Saran Cotes</b> Community & Wellbeing Coordinator

- Oversee recruitment, induction, and allocation of volunteers.
- Ensure quality of service and volunteer support.
- Coordinate risk assessments and respond to safeguarding concerns.
- Monitor volunteer reports to ensure consistent levels of service are provided.

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## 6. Volunteer Roles

### Volunteer Role Description

Volunteer's role descriptions can be found on our website [Age UK Norfolk | Volunteer with us](#)

### What makes a good Volunteer

- Engage your support network within and outside the organisation.
- Demonstrate empathy - listen attentively, acknowledge concerns, and encourage a positive outlook.
- Communicate effectively- use active listening, a calm voice, be attentive, warm, open and respectful. Avoid sharing personal opinions or attitudes.

- Identifying any extra support you or your Service User may need and report this to the staff team.
- Facilitate open discussions while ensuring safeguarding principles are upheld.

### **What a Volunteer should NOT do**

- Share personal information with external organisations or individuals, except for approved safeguarding issues.
- Disclose your personal information to the Service User e.g. address, phone number.
- Accept or provide gifts (Review gift policy).
- Maintain contact with the Service User after the case has been closed.
- Criticise services the Service User receives - remain neutral and supportive.
- Provide counselling or emotional support beyond your role (contact the staff team if concerns arise).
- Provide medical advice – refer to their doctor, 999 or NHS 111 for health concerns.
- Enquire about personal information, such as finances, bereavements or sensitive issues.
- Attempt to lift or physically support a service user, instead call for assistance.
- Recommend other services or professionals- this information should only be supplied through our Information and Advice team, who will supply three options from reputable sources.

### **Volunteer induction**

Once a volunteer has been fully vetted and inducted, they can start to support the service. See the Volunteer handbook for details.

**Note to staff-** A volunteer cannot be active on CLOG until they have completed all the sections in the recruitment procedure and returned all relevant documents.

- Add the volunteer to the 'Groups and Skills' tab and mark the 'Preferred method of contact' box.
- Set required actions for the relevant service.

- While the volunteers are active, it is the responsibility of the staff team to keep the volunteers' records up to date.
- During Annual Reviews ensure that details are checked and updated.
- Staff update CLOG.
- Update CLOG with training events attended in the Clubs and Clinics section.

If group emails are sent, volunteers' email addresses must be hidden, using the BCC function.

### **Volunteers - On Hold**

We understand that volunteers may occasionally need to take a break from their role, if a volunteer has been on hold for more than **six months**, they then require a re-induction meeting with their Co-ordinator before resuming any activity. This is to ensure they are up to date with any changes in policies, procedures, or service information.

The meeting can take place via phone call, in-person, or over Microsoft Teams—whichever is most convenient. This step helps us maintain a consistent, informed, and supported volunteer experience for everyone involved.

**Note to staff** - If a volunteer is on hold, this needs to be clearly marked on CLOG, with an action to contact the volunteer in a pre-agreed period. Please inform the Volunteer Co-ordinator. If it is not suitable for the Volunteer to be contacted while they are 'on hold,' please conclude them on the Groups and skill tab, temporarily.

### **Volunteers - Leaver**

If a volunteer wishes to end their volunteering experience with Age UK Norfolk, it is important that all active cases are handed back to a Companionship Co-ordinator and their service users informed as soon as possible. We will attempt to provide continuity of service where possible. The volunteer must be reminded that they are unable to continue to support any Age UK Norfolk service users once they have left and they must:

- Delete/destroy all contact information they hold for any service users.
- Return all AUKN property including their I.D badge.

**In all cases the Volunteer needs to end all contact with the service user and both parties need to be advised that if they continue a relationship this is outside of AUKN and there will be no insurance cover in place.**

<b>Note to staff</b> Update CLOG, conclude groups and skills, set an action to close the volunteer for the volunteer Co-ordinator.
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## 7. Volunteer Support and Supervision

Each volunteer can expect support from the whole of the Companionship Team.

Volunteers may request a face-to-face Supervision session with their Co-ordinator at any time.

- Volunteers receive training and annual reviews.
- Support is always available from a Co-Ordinator.
- We will hold Group 'Volunteer catch up' twice a year via a Teams link. It is expected that active volunteers will attend at least 1 network meeting a year and engage in Age UK Norfolk's Volunteer community.

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## 8. Service Users

### Service users Rights

- To receive assistance from a trained companion, following the service principles, who will have knowledge and understanding of the needs and issues affecting older people.
- Be treated as an individual, with dignity and respect according to the principles of the service.
- To have their case dealt with promptly and thoroughly.

### Receive a service which offers:

- An introductory visit or call (service led) by the service Co-ordinator.
  - Regular contact from Age UK Norfolk until a suitable companion is found.
  - Address complaints from both service users and Volunteers. To learn from complaints, and to carry out any changes of practice if necessary.
  - To ensure compliments and complaints are given equal recognition.
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## 9. Keeping Safe and Safeguarding

Age UK Norfolk is a co-signatory to the Norfolk Safeguarding Adults Joint Policy and Procedures and is committed to always protecting vulnerable adults.

If you suspect or identify any form of abuse affecting your Service User, **report it immediately** to the Companionship Team. **Do not promise confidentiality** - safeguarding requires full transparency. Stay calm, listen carefully, and support the Service User appropriately.

The staff team will manage safeguarding concerns following our policy, which may involve Social Services or the Service User's GP. Volunteers will be informed of any necessary next steps. Lack of updates from Norfolk County Council or GPs does not mean action isn't being taken.

For further guidance, refer to the [Raising a concern | Norfolk Safeguarding Adults Board](#)

**If you believe your client is in immediate danger phone the appropriate emergency service.**

### Risk Assessment

To protect staff and volunteers whilst lone working in the community, all known or identified risks will be recorded and shared in line with our policies.

As part of the risk assessment, we use the 'Clutter scale' to ascertain if the client has a hoarding issue or disorder. Hoarding can be part of other mental or physical health problems. If your client is displaying hoarding tendencies, please speak to your Co-Ordinator for guidance. [NSAB-SNH-Practitioner-Guide-May-2025.pdf](#)

Keith's story - A personal and touching film about hoarding  
<https://www.youtube.com/watch?v=fhmftpwnNZc>

### Notifying Volunteers of Identified Risks

After assessing identified risks and confirming the service can proceed, the volunteer will be informed of any risks and applicable restrictions. They must acknowledge their understanding and confirm their willingness to support the service user.

**Note to staff** – All risks must be noted on the risk assessment tab on CLOG for example, pets, smoking, hoarding and other people living or regularly visiting the property

### Sharing personal information

Never share your personal contact details with service users to prevent unwanted requests beyond the agreed support. Service users should contact the Companionship Team if



needed. When calling a service user, withhold your number using the 141 prefix. When sharing contact details with professional's exercise caution.

## **Transporting a Service User and Manual Handling**

Volunteers and staff **should not** transport a service user in their car even if they have the correct insurance, also volunteers and staff cannot accept a lift in a service users' car.

To ensure the safety and dignity of both service users and our team, it is important to remember that staff and volunteers must not lift service users or push them in a wheelchair under any circumstances. These actions carry potential risks of injury and may compromise the wellbeing of both parties.

## **Personal Safety**

Age UK Norfolk have a responsibility under the 'Lone Workers Policy' to provide you with support should you ever feel unsafe or in danger whilst out on a visit.

- Visits must take place during office hours (9.30am-4.30pm) for staff support.
- All visits must be logged via the 'Visit Appointment Form' in the Volunteer Hub **prior** to the visit taking place, this can be found in the [Volunteer Information Hub](#)
- Risks are assessed; however, volunteers must always remain vigilant for their own personal safety.
- Any concerns should be reported to a Co-ordinator promptly.

## **To mitigate any risks:**

Ensure you follow the guidance in the lone working policy, for example:

- Ensure you have the relevant Age UK Norfolk staff contact information with you.
- Park in a well-lit area if possible, so that the vehicle is safe, and you will not be at risk when you leave or return to it.
- Be alert when negotiating difficult access routes, if it is dark carry a torch if possible.
- Ask that pets in the house are under control.

- Ensure the exit route is clear and always place yourself between the service user and the exit.
- If anyone becomes angry or makes you feel uncomfortable then leave immediately.
- If someone falls, do not attempt to lift them, but call for assistance.
- Age UK Norfolk can provide you with a personal alarm.

**Note to staff** – Once an appointment has been arranged it is the responsibility of the person visiting to log their visit on the Visit Appointment form as mentioned above.

## COVID 19

The latest government guidance on living safely with COVID-19, can be found [here](#). We follow current guidelines and have no additional restrictions in place.

Since we work with vulnerable individuals, we should minimise infection risks and respect personal preferences - such as wearing a mask if requested. Care homes may have their own rules, which should be followed alongside our guidance.

COVID Testing & Vaccinations: If you wish to test before a visit but cannot access a free test, consult your Co-ordinator before incurring any costs. You are not required to inform us about vaccinations, tests, or results.

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## 10. Information, Advice, Signposting and Referrals

### Information

Information is providing facts in response to a question. Information is not person specific and would be the same for every Service User.

If you are asked for any information to be given, please contact our I&A team who will contact the Service User and provide the Information. ([advice@ageuknorfolk.org.uk](mailto:advice@ageuknorfolk.org.uk) / 0300 500 1217)

### Advice

Advice is to guide or recommend options in relation to a problem unique to a person.

**Advice always should be provided by our I&A team; they can provide impartial information and Advice and help Service Users make informed decisions.**

If a service user requires specialist legal or financial advice, for example, releasing equity on their house, investment advice, advice about taking a lump sum as part of a pension etc. they must be referred to an independent expert.

### **Signposting**

Signposting is when a service user is given information of other organisation(s) that would be able to assist them. The Service user then contacts the organisation themselves.

### **Referral**

This is when the volunteer contacts the organisation on behalf of the service user and makes an appointment for them, with the service user's consent. If the need arises for this, please contact the staff team before taking any action.

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## **11. Referral and Active Case Management**

- Referrals can be made by our Information & Advice Team, professionals, individuals, or their family and friends. Each referral must include a completed referral form, available on our website. [Age UK Norfolk | Our Services](#)
- Referred individuals will need to meet the service criteria and consent to participate.
- Volunteers and Service users are matched based on location, interests, needs, and availability.
- All our volunteers are referenced and have been DBS Enhanced checked.
- All discussions remain confidential within our organisation, unless a potential Safeguarding issue is identified, which we have a duty of care to report.
- Volunteers will be approached about potential matches and if they agree, an introduction to the service user will be made, either on the phone or in person at a joint visit (service dependent).

<p><b>Note to staff</b> - Share the proposed goals, referral form and any identified risks with the volunteers. Make them the usual volunteer.</p>
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|---|
| <ul style="list-style-type: none"><li>• After reviewing, add the case to the wait list until a suitable volunteer is available</li><li>• Send an acknowledgement letter</li></ul> |
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- |  |
|--|
| <ul style="list-style-type: none"><li>• Add actions for the relevant service- reviews, Birthday cards etc.</li><li>• If TB, add to office log so staff can maintain contact until a volunteer is identified.</li></ul> |
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## 12. Volunteer Reporting

Volunteers are required to submit reports via the online link provided in the [Volunteer Information Hub](#)

- **Monthly** for *Telephone Befriending*
- **Weekly** for *face-to-face services* (to be found under the Companionship project)

These reports are essential for:

- Monitoring individual cases
- Staying connected with our volunteers
- Understanding and responding to service user needs
- Supporting current and future funding applications

In addition, we ask all volunteers to record their upcoming home visits using the [Appointment Details](#) **before** the visit takes place. This enables Age UK Norfolk to be aware of when visits are occurring, helping to ensure both coordination and safeguarding. The form is also accessible through the [Volunteer Information Hub](#)

## 13. Closing a case

We will close a Travelling companion case once all goals have been achieved, or 6-8 sessions have been provided.

We will close Gift of Friendship cases once all goals have been achieved, or 6 months of support have been provided - transition to Telephone Befriending will be offered.

On the final visit/phone call we will complete the six-month review and discuss transition to Telephone Befriending if appropriate. An end of service letter will be sent ensuring the Service user has our contact details and is aware of our services.

We will close Telephone Befriending cases after 1 year and take the loneliness and wellbeing measurements we will offer to make a referral to Age UK National's Telephone Befriending service if appropriate.

In certain circumstances we may have to close a case prematurely, this may happen for a variety of reasons.

- If a service user is presenting false information.
- If a service user is acting unlawfully.
- If a service user is abusive in anyway.
- If the environment/situation becomes unsafe.
- If the circumstances of the case are beyond Age UK Norfolk's limitations.
- **Mental capacity.** We can only support individuals who are believed to have capacity. We must assume capacity unless proven otherwise. If concerns arise, NCC or the GP can be asked to conduct an assessment.

According to the *Mental Capacity Act (MCA)*, a person is presumed to have capacity unless proven otherwise. A person may lack capacity if they cannot:

- Understand relevant information for a decision.
- Retain that information.
- Use or weigh the information to make a decision.

Some individuals may experience fluctuating capacity or appear to lack capacity due to conditions like a UTI. Always consider these factors when assessing their ability to make decisions.

If any of the above occurs, Age UK Norfolk will send a letter explaining the termination. Depending on the circumstances, the Complaints Procedure may be offered or addressed in person by a Co-Ordinator or Manager. The Befriender must end all contact, and both parties will be informed that any continued relationship is outside AUKN and not covered by insurance.

**Note to staff** – Update CLOG – Complete goal objectives, complete all open actions, add closed date in the summary tab, complete the job card. (Be careful not to close a job card for another service).

### **Deceased service users**

Check the history on CLOG and ensure you email anyone with a relevant outstanding action or relationship (social worker) that the service user is deceased so they can take any action for their service. Marking a service user as deceased on CLOG will end all projects and close all actions. Age UK Norfolk will also send a condolence card to the family and friends of the deceased. Add an action.

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## **14. Project-Specific Guidance**

### **Telephone Befriending –**

Provides companionship and weekly conversation for approximately 30-minutes to people aged 50+ living in Norfolk.

To ensure a positive experience, participants should be able to hear and communicate clearly by phone and not be receiving treatment for mental health conditions or struggling with aggression, inappropriate conversation, or substance-related issues.

We can support those with mild memory loss, as long as calls remain a source of comfort rather than distress.

We will take any learnings from our new Gift of Friendship project and use goal setting within our Telephone Befriending relationships, if we feel it will be valuable. This is not a requirement of receiving the service.

### **Responsibilities of a Befriender Staff and Volunteers**

- Undertaking person centred conversations with their Service User.
- Working within the agreed guidelines of this manual and Age UK Norfolk policies and procedures.
- Ensuring that Age UK Norfolk have your up-to-date personal information and emergency contact details.
- Recognising the importance of this service and committing to initial induction, training and periodic updates.
- Follow the recording and monitoring procedures.

### **Number of Service User**

The number of Service Users each volunteer calls every week is dependent on the time they have available. The volunteer's experience and capabilities must also be taken into consideration. The maximum number of Service Users a volunteer can have is 6.

### **Weekly Quiz**

The Befriending Service offers social interaction, mental stimulation, and entertainment. Volunteers receive a weekly quiz to use as a conversation starter, if Service Users are

interested. There's no competition or prizes but tallying the score may give Service Users a sense of achievement. If they struggle, offer hints or skip the quiz to avoid distress.

### **General tips for making a call to an older person**

- Introduce yourself and remind the Service User this is their weekly call. If they are confused, simply ask if they'd like to have a chat.
- Keep it simple - some Service Users may tire easily, and occasional reminders of who you are might be needed.
- Be mindful - some Service Users may be housebound, in care homes, or have limited social interaction, affecting conversation topics.
- Respect boundaries - only share personal information within service guidelines (first name only).
- Encourage positive conversation - acknowledge concerns but gently steer discussions away from aches and pains.
- Rephrase if needed - if a Service User struggles to understand, simplify your wording.
- Show patience - if they repeat questions, answer kindly each time.
- End on a positive note - express enjoyment and look forward to the next call.

### **Closing the Conversation**

- Establish boundaries early.
- Say something like, "Time has flown! Shall we arrange our next call?"

### **After the Call**

- After the call, please record details of your call, this can be logged weekly or monthly on a Microsoft form. A brand-new link will be emailed to you each month.
- During normal office hours (Mon – Fri 9-5pm) - To raise concerns and to report any issues please contact staff promptly, by emailing [befriending@ageuknorfolk.org.uk](mailto:befriending@ageuknorfolk.org.uk) or calling 01603 785223 leaving a voicemail and we will get back to you.
- If an urgent matter arises outside of normal office hours (5-7pm weekdays, 9am-7pm weekends and bank holidays) this phone switches to our on-call facility, open

until 7pm. Please ensure all calls are finished by 6.30pm to enable you to access the on-call service.

- All emergency situations should be referred to the emergency services.
- Debrief if needed- staff are available to support after challenging calls.

### **Calling Service Users with Dementia or Memory Loss**

- Dementia can affect conversation flow and response time. We continue support while calls remain helpful, not distressing.
- If a Service User makes inappropriate comments, consult staff for guidance.
- More dementia resources are available via Age UK Dementia guides [ID205690 Age UK Living with dementia\\_05\\_25](#)
- We encourage all staff and volunteers to become **Dementia Friends** - online training is available with more details in our Volunteer Handbook. Dementia affects individuals differently, so not every tip may apply.
- Create a calm environment - eliminate background noise and calls may need to be kept short.
- Speak clearly and calmly - use simple sentences, allowing yes/no answers, avoid raising your voice, and allow time for responses. If they seem upset offer reassurance.
- Clarify gently - if unclear, ask for repetition or rephrase for better understanding.
- Let them lead - don't interrupt or supply words for them. Encourage description if they struggle to find the right term.

### **Greeting Cards for Service Users**

The staff team can send cards for:

- **Birthdays**
- **Christmas**
- **Hospital stays**
- **Bereavements**



## **Travel Companion –**

Our service connects lonely and isolated older people in Norfolk with trained travelling companions. We help them rebuild social connections, regain confidence, and overcome barriers to leaving their homes. Through support with public and community transport, walking, and cycling, companions will accompany Service users on journeys and provide empowering support to enable them to be able to eventually travel independently. This short-term support, lasting 6–8 weeks, aims to ease anxiety and restore confidence in navigating daily life.

Later life should be a fulfilling and enjoyable experience, and older people should be enabled to play a full part in community life.

### **Our objectives are:**

To help address the barriers faced by going out, such as anxiety and a lack of confidence.

To increase confidence levels and to reduce the anxiety that many older people experience.

### **Responsibilities of Travelling Companion Staff and Volunteers**

To accompany a Service User on journeys to provide empowering support enabling clients to be able to take the journey alone eventually.

Undertaking person centred conversations, understanding that each person is different and has different views, goals, and desired outcomes.

Working within the agreed guidelines of this manual and Age UK Norfolk policies and procedures.

Ensuring that Age UK Norfolk have your up-to-date personal information and emergency contact details.

Recognising the importance of this service and committing to initial induction, training and periodic updates.

Follow the recording and monitoring procedures.

Informing the service user and Co-ordinator in advance if they are unable to make a visit.

Taking care to notice any changes in the service user and to inform the Co-ordinator.

Not taking any other person to the service user's home or on to a journey unless authorised by the service user and the Co-ordinator.

## Initial call to the Service User

The Co-ordinator will assess how the service user is feeling and help them set **personal goals**, such as taking a bus into town or joining a local group. They will explain the need for certain questions to meet funding requirements.

In some cases, the Co-ordinator may decline the service if the individual lacks the mental capacity to engage, if safety concerns exist for volunteers, or if third-party involvement complicates support.

## Guidelines for Visits

Introduce yourself, stating your role at Age UK Norfolk, and confirm how the service user would like to be addressed, if needed, recap key details.

Please always wear your lanyard so that service users can easily identify you.

- Volunteers provide companion support
- All companions are **DBS-checked and referenced**
- Conversations are confidential within Age UK Norfolk, except in safeguarding concerns arise
- The service is flexible, with visit schedules arranged between the user and their companion, however these visits **must conclude before 4.30pm weekdays** and not take place at weekends or on Bank holidays- This ensures that our volunteers are able to speak to a member of Age UK Norfolk's staff team if a concern arises.

**Staff Note:** Document visit details in **CLOG** as soon as possible, including consent, risks, and tasks.

## Introducing a Volunteer to a Service User

- Where possible, a Service Co-ordinator will accompany you on your first visit to formally introduce you to the service user. They will remain for the initial part of the meeting, then step away part-way through to allow you and the service user time to begin building a relationship
- Once introduced, journey planning is arranged directly between the Service user and the volunteer.
- The Co-ordinator offers ongoing support as needed, maintaining contact with volunteers, who must submit journey reports after each trip for review and action.
- Volunteers are required to log visits on the [Appointment Details](#) prior to the visit taking place. This can be found on the [Volunteer Information Hub](#)

## After the visit

- Volunteers are required to report on visits promptly after a completed visit, via the 'Travelling Companionship session reporting' link which can be found on the [Volunteer Information Hub](#) under the Companionship section.
- During normal office hours (Mon – Fri 9-5pm) - To raise concerns and to report any issues please contact staff promptly, by emailing [travellingcompanionship@ageuknorfolk.org.uk](mailto:travellingcompanionship@ageuknorfolk.org.uk) or calling 01603 785210 leaving a voicemail and we will get back to you.
- All emergency situations should be referred to the emergency services.
- Debrief if needed, staff are available to support after challenging visits.

## Gift of Friendship service-

Age UK Norfolk's Gift of Friendship project takes a proactive, goal-oriented approach to helping individuals aged 50+ reduce loneliness and social isolation across Norfolk. This service is being replicated by a further nineteen Age UK's across the country.

- **Face-to-Face Befriending:** This six-month service fosters meaningful connections through friendly weekly visits, whether at a person's home or care facility. Our volunteers provide companionship and support to help individuals achieve their personal goals.
- **Telephone Befriending:** For those who prefer, our goal-oriented telephone befriending service offers regular conversations to build connections and encourage personal growth. This service will also be offered when the face-to-face service concludes after six months.

## Objectives

We tailor our approach based on individual needs; our support is designed to create a safe, positive, and engaging environment where barriers to community engagement, such as anxiety, low confidence, or social withdrawal—can be identified and effectively addressed.

By focusing on building trust and promoting personal growth, we empower individuals to develop meaningful relationships and to participate confidently in local community life.

## Responsibilities of Gift of Friendship Staff and volunteers

To visit a Service User in their home for a time limited period with the aim of combatting isolation and loneliness, using goal setting to achieve personalised goals

Undertaking person centred conversations, understanding that each person is different and has different views, goals and desired outcomes.

Working within the agreed guidelines of this manual and Age UK Norfolk policies and procedures.

Gradually support a service user, if required, to access the local community to build confidence and relationships.

Ensuring that Age UK Norfolk have your up-to-date personal information and emergency contact details.

Recognising the importance of this service and committing to initial induction, training and periodic updates.

Follow the recording and monitoring procedures.

Informing the service user and Co-ordinator in advance if they are unable to make a visit.

Taking care to notice any changes in the service user and to inform the Co-ordinator.

Do not carry out tasks within the home that go above the expectations of this service.

Not taking any other person to the service user's home unless authorised by the service user and the Co-ordinator.

### **Initial call to the Service User**

The Co-ordinator will assess how the service user is feeling and help them set **personal goals**, such as, building confidence to use the phone, inviting a neighbour in for a cup of tea, volunteering or joining a local group. The Co-ordinator will explain the need for certain questions and processes to meet funding requirements.

In some cases, the Co-ordinator may decline the service if the individual lacks the mental capacity to engage, if safety concerns exist for volunteers, or if third-party involvement complicates support.

## Guidelines for initial visits and risk assessments

Introduce yourself, stating your role at Age UK Norfolk, and confirm how the service user would like to be addressed. If needed, recap key details:

Please always wear your lanyard so that service users can easily identify you.

- Volunteers to provide goal based befriending support
- All Volunteers are DBS checked and referenced
- Conversations are confidential within Age UK Norfolk, except if safeguarding concerns arise
- Visits will be arranged between the Service user and their befriender; however, these visits **must conclude before 4.30pm weekdays** and not take place at weekends or on Bank holidays- This ensures that our volunteers are able to speak to a member of Age UK Norfolk's staff team if a concern arises.

**Staff Note:** Document visit details on **CLOG** as soon as possible, including consent, risks, and tasks.

## Introducing a Volunteer to a Service User

- The Co-ordinator will notify the service user about their assigned volunteer, and in most cases accompany the volunteer for a short period, on the first visit and make a personal introduction.
- Telephone calls from the volunteer will come from a withheld number. If a Service User needs to contact their Befriender in between visits, this should be done via the office team.
- The Co-ordinator offers ongoing support as needed, maintaining contact with volunteers, who must submit weekly reports after each visit for review and action.
- Volunteers are required to log visits prior to attending the Service users' home via the [Appointment Details](#) which can be found in the [Volunteer Information Hub](#)

## Number of Service Users

The number of Service Users each volunteer visits every week is dependent on the time they have available. The volunteer's experience and capabilities must also be taken into consideration. The maximum number of Service Users a volunteer can have is 4.

## Concluding the visit

- Establish boundaries early, home visits should be no longer than one hour

- Say something like, “Time has flown! Shall we arrange our next visit?”

### **After the visit**

- Volunteers are required to report on visits promptly after a completed visit, via the ‘Gift of Friendship’ link which can be found on the [Volunteer Information Hub](#) under the Companionship section.
- During normal office hours (Mon – Fri 9-5pm) - To raise concerns and to report any issues please contact staff promptly, by emailing [befriending@ageuknorfolk.org.uk](mailto:befriending@ageuknorfolk.org.uk) or calling 01603 785223 leaving a voicemail and we will get back to you.
- All emergency situations should be referred to the emergency services.
- Debrief if needed, staff are available to support after challenging visits.

### **The Gift of Friendship: Six-Month Goal-Based Support Programme**

The Gift of Friendship service has been specifically designed as a structured, six-month intervention aimed at reducing social isolation and loneliness while supporting individuals to build confidence and pursue personal goals.

This service follows a clearly defined model to ensure consistency and enable meaningful data collection. The outcomes and learning from the programme will contribute to the development of a government policy paper; therefore, following the service design is essential.

#### **Key considerations:**

- **Consistency of Delivery:** All staff and volunteers must adhere to the agreed structure and principles throughout the service duration to ensure reliable evidence is captured.
- **Transition Planning:** Service Users must be made aware that face-to-face visits will conclude at the end of the six-month period.
- **Ongoing Support Options:** Upon completion, individuals will be offered a transition to *Telephone Befriending*, a goal-oriented follow-on option that continues to support progress toward their personal aims.
- **Volunteer Reallocation:** On completion of the six-month period volunteers can be introduced to a new Service User who would benefit from their support and shared commitment to goal achievement.

## **Care home visiting**

This service is a small pilot and offers regular visits for those residents who are unable to join in with the home's social activities. This will typically be a resident who is bedbound and has no regular visitors. Currently this is only taking place in one care home. Volunteers are required to log visits via the [Appointment Details](#) prior to the visit taking place.

[Volunteer Information Hub](#)

## **Service User referrals**

All referrals will be made by the care home manager.

## **Responsibilities of Staff and volunteers**

To visit a Service User in their care home setting with the aim of combatting isolation and loneliness

Undertaking person centred conversations, understanding that each person is different with different views.

Working within the agreed guidelines of this manual and Age UK Norfolk policies and procedures.

Ensuring that Age UK Norfolk have your up-to-date personal information and emergency contact details.

Recognising the importance of this service and committing to initial induction, training and periodic updates.

Follow the recording and monitoring procedures.

Informing the service user and Co-ordinator in advance if they are unable to make a visit.

Taking care to notice any changes in the service user and to inform the Co-ordinator.

Do not carry out tasks within the home that go above the expectations of this service.

Not taking any other person to the service user's home unless authorised by the service user and the Co-ordinator.

## **Guidelines for initial visits**

Introduce yourself, stating your role at Age UK Norfolk, and confirm how the service user would like to be addressed. If needed, recap key details:

Please always wear your lanyard so that service users can easily identify you.

- All Volunteers are DBS checked and referenced
- Conversations are confidential within Age UK Norfolk, except if safeguarding concerns arise
- Visits will be arranged between the Service user and their befriender; however, these visits must conclude **before** 5 pm weekdays and not take place at weekends or on Bank holidays- This ensures that our volunteers are able to speak to a member of Age UK Norfolk's staff team if a concern arises.

### **Number of Service Users**

The number of Service Users each volunteer visits every week is dependent on the time they have available. The volunteer's experience and capabilities must also be taken into consideration. The maximum number of Service Users a volunteer can have is 4.

### **Concluding the visit**

- Establish boundaries early, home visits should be no longer than one hour
- Say something like, "Time has flown! Shall we arrange our next visit?"

### **After the visit**

- Volunteers are required to report on visits promptly after a completed visit, via the 'Face to Face Befriending visits' link which is provided at the start of your volunteer journey and can be found on the [Volunteer Information Hub](#) under the Companionship section.
- During normal office hours (Mon – Fri 9-5pm) - To raise concerns and to report any issues please contact staff promptly, by emailing [befriending@ageuknorfolk.org.uk](mailto:befriending@ageuknorfolk.org.uk) or calling 01603 785223 leaving a voicemail and we will get back to you.
- All emergency situations should be referred to the care home staff immediately.
- Debrief if needed- staff are available to support after challenging visits.



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## 15. Dealing with Challenges

**Contact staff if the relationship is not working.** 'We don't click' - In the Companionship team, we strive to create a warm, friendly, and easy-going environment for everyone. However, we understand that sometimes people just don't click - and that's perfectly okay!

Our goal is to match Service Users with volunteers they genuinely enjoy talking to. If a match isn't working, simply let us know, and we'll do our best to find a more compatible pairing. It's never anyone's fault - sometimes personalities just don't align!

We want every volunteer and Service User to feel comfortable and valued, so don't hesitate to reach out.

### Supporting Service Users with Greater Needs

While we recognise that isolation and loneliness can lead to low mood, our service does not provide intensive emotional support or counselling. If a Service User's needs exceed what we can offer, we may need to end their Service Usership following a discussion with staff and the Service User.

When necessary, we can refer them to appropriate support, such as:

- **GP** for a Wellbeing Service referral
- **Social Services** (if mental capacity is a concern)
- **Samaritans**
- **Counselling or mental health services** (e.g. Mind)

### Handling Difficult Calls

- **Managing frustration** – Some Service users may express anger, impatience, or unreasonable demands. Stay calm, listen, and reassure. If the situation feels intimidating or beyond your capacity, end the call and inform the staff team.
- **Supporting distressed Service users** – If a Service User is tearful or upset, remain empathetic yet professional. Gently end the call and discuss the situation with staff.
- **Ending on a positive note** – Before concluding a difficult call, ask about something that made them smile - a pet, a TV show, or even the conversation itself - to lift their mood.

### Reporting Changes in Service User Behaviour

If you notice a change in a Service User's behaviour, inform the staff team immediately. Possible reasons include:

- Low mood or increased vulnerability
- Recent bereavement
- Difficulty engaging in conversation
- Unassessed support needs
- Signs of mild dementia, confusion, or communication issues
- Mentioning suicide without clear intent
- End-of-life care
- Becoming hard to reach
- Safeguarding concerns

While our service supports those who fit its remit, life circumstances can change, sometimes requiring short-term support or, in some cases, ending our support. Discuss any concerns with staff to ensure appropriate action is taken.

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## 16. Frequently Asked Questions

- What to do if a Service User does not answer? Leave a single message, if able, to avoid filling the answering machine. Report unusual lack of contact or if they have been unreachable for more than a week. If the service user has consented, we may hold an alternative contact. We will try to make contact to find out if the Service User is ok or alternatively write a letter.
- Unable to call or visit your Service User. **1–2 weeks:** Inform your Service User directly, **more than 2 weeks:** Notify both your Service User and the staff team. They will discuss whether a temporary solution is needed until you return.
- My Service User is interested in a will, how can AUKN support them? If a service user is interested in a Will, refer to our Information and Advice team, who will provide the details of three suitable will writers. We also have a service that can help Service Users register LPOA's, refer to our Information and Advice team.
- My Service User wants to leave me a bequest in their will? If a Service User wishes to leave a bequest, they should know that staff and volunteers cannot be named in Wills. However, the charity welcomes legacies to support its work (Charity No. 1077097). **Volunteers cannot act as a witness to a Will.**

- Can volunteers attend funerals? If you wish to attend the funeral, the staff team will seek approval from the next of kin.
- My Service User has told me they are moving home, or their personal information has changed - inform the staff team
- My service user has agoraphobia; can we still support them? Agoraphobia means ‘having an extreme or irrational fear of entering open or crowded places, of leaving one's own home, or of being in places from which escape is difficult’. It is unlikely we will be able to support someone with agoraphobia as to be supported with this they may need a trained professional. However, we will look at each case individually.

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## 17. Useful Information

The language we use in the Service is important. We use the term ‘older people’ instead of elderly, pensioners, OAPs etc.

### Working with people who do not engage

We do often work with people who struggle to engage. We will do our best to engage with these service users, however if we are unable to help, we will end the service.

Refer to appendix section for a “Toolkit” for when a service user is not engaging.

If you continue to struggle with a service user who will not engage, please speak to your Co-ordinator.

### Helpful conversation starters

Sometimes direct questions can cause confusion; open questions are sometimes easier to answer whilst trust is established.

“We haven’t spoken before so would you like to tell me a bit about yourself?”

“How long have you lived in Norfolk?”

Referring to their interests, “I see that you like...” or “Have you seen (or read) ...”.

If you have a shared interest, create a question like “I see that you are interested in Strictly Come Dancing, what did you think of ....”.

Age Uk Norfolk Service Guide	Age UK Norfolk Service Guide – Volunteers and staff should be familiar with the full range of Age UK Norfolk’s services and	<a href="#">Age UK Norfolk   Our Services</a>
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	aware of any referral criteria.	
Age UK Norfolk and National Information Resources	This is an index of our factsheets; all factsheets can be found on our website and can be shared with volunteers and service users.	<a href="#">Age UK Guides and Factsheets</a> <ul style="list-style-type: none"> <li>• <a href="#">Information guides</a></li> </ul>
Lion fridge pots	This is a simple idea designed to encourage people to keep their basic personal and medical details on a standard form and in a common location – the fridge	<a href="http://www.lions105sw.org.uk/">http://www.lions105sw.org.uk/</a>
Cold caller stickers	You can download a printable version from Neighbourhood watch	<a href="http://www.ourwatch.org.uk">www.ourwatch.org.uk</a>
Parking Permits	We hold parking permits for Norwich city centre and Great Yarmouth. These are for use by staff and are held at head office and should be signed out when taken	
Ideas for Ears	<p>We have been given access to this 45-minute training video in collaboration with Age UK National and Hearing link, as charity supporting hearing loss.</p> <p>They have produced a video resource to support people who are using phone and video calls to deliver services to older people, a high proportion of whom have hearing loss.</p> <p>The video by Ideas for Ears is highly practical and looks at problems caused for those not easily able to</p>	<a href="#">Ideas For Ears Raquel and Avery</a>

	<p>hear and follow what's said on phone or video calls, and how to fix them. Phone and video calls are being used far more since COVID-19. The video will help managers, staff and volunteers to make their phone and video calls easier for people to hear and follow. The video is split into 3</p> <p><b>Part 1</b> – why it matters</p> <p><b>Part 2</b> – the challenges experienced by older people when using phone and video services</p> <p><b>Part 3</b> – how service providers can reduce or remove the challenge</p>	
REST	<p>REST is a partnership project that brings together mental health support, local services and a place where everyone can feel welcome. REST stands for Recover, Eat, Support, and Talk, reflecting the different ways we can be more connected in our community.</p>	<a href="http://restnorwich.co.uk">restnorwich.co.uk</a>
At a Loss	<p>At a loss is a comprehensive hub of bereavement support and information for anyone bereaved and those supporting bereaved people in the UK. You can search using filters according to age, location, relationship to the deceased and circumstances of death and find support from the many hundreds of services listed, confident that the details are accurate and up</p>	<a href="http://www.ataloss.org">www.ataloss.org</a>

	<p>to date, cover the whole of the UK and offer choices from a wide range of support available. Useful things to read, helplines and a free live-chat counselling service are also available on the website to help anyone deal with their loss, whatever the circumstances. At a Loss is committed to ensuring that older people access the support they need as easily as possible and there are many services listed and information provided that are dedicated to the over 65's. We are also collaborating with others to improve access through voice recognition technology, so that those who find accessing the internet a challenge, can find support using a landline phone and in their own language.</p>	
West Norfolk Befriending	<p>We generally work with older people, who have a physical reason for being isolated – this could be hearing loss, physical disability, poor mobility or caring responsibilities. We cover West Norfolk, following the boundaries of King's Lynn and West Norfolk Borough Council.</p>	<p><a href="#">West Norfolk Befriending – Providing a listening ear (charity no. 1111735)</a></p>
Age Concern Swaffham & District Befriending Service	<p>The Befriending Service is aimed at improving the quality of life for lonely older people through support and friendship during regular one-to-one</p>	<p><a href="mailto:befriendingageconcernswaffham@outlook.com">befriendingageconcernswaffham@outlook.com</a></p>

	befriending in the Client's own home.	
Letterbox	a free pen pal befriending service for socially isolated and lonely people. Our clients are carefully matched with volunteer befrienders, with whom they exchange supportive, friendly letters. They share stories about their lives, families, and interests.	<a href="#">Letterbox - Omega... Ending Isolation   Ending Loneliness</a>
Vision Norfolk	Volunteers, with direct experience of sight loss – provides weekly tele friend calls to visually-impaired people	<a href="#">Homepage - Vision Norfolk</a>
Deafblind UK	befrienders are available to talk, laugh and build lasting friendships	<a href="#">Deafblind UK   Supporting Deafblindness in the UK</a>

## 18.Grief

Tips on supporting someone who is grieving

Often clients come to us for support because they are isolated after losing a loved one. Below are some items

that should be considered when supporting someone that has been bereaved.

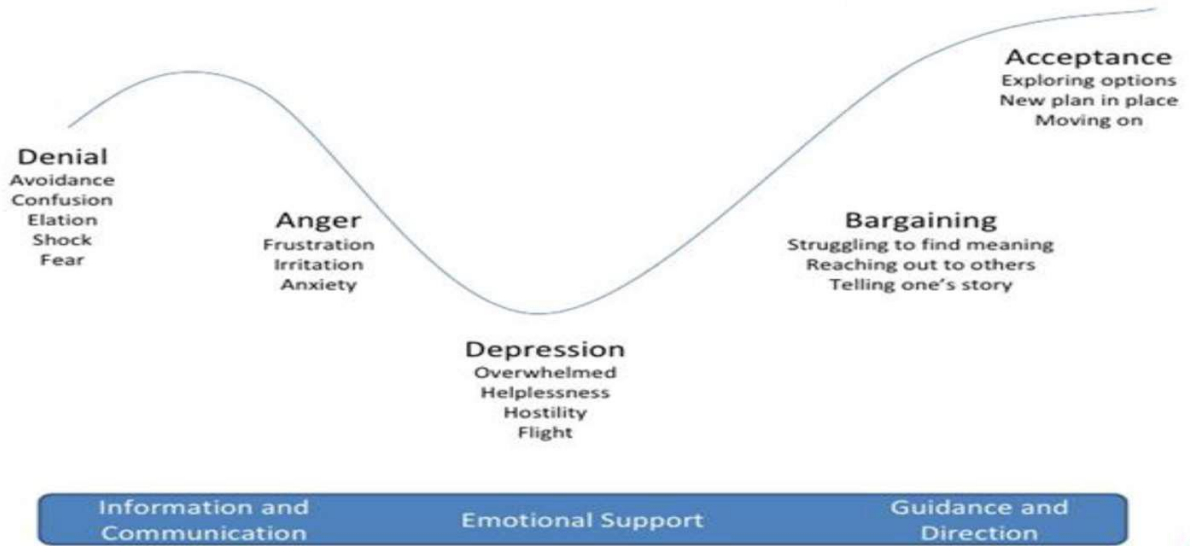
What Does It Mean to Grieve?

Grief is exhausting. Grief is a natural process but is an individual experience. Grief can incorporate many different emotions such as guilt, anger, numbness, loneliness, anxiety, hopelessness, fear, regret, depression.

Consider that someone could be grieving for the person who has passed away as well as the loss of any roles they may have played e.g. a full-time caring role

Grief can also show irrational displays of emotion, a small item in everyday life such as a lightbulb going could trigger the service user.

# Kübler-Ross Grief Cycle

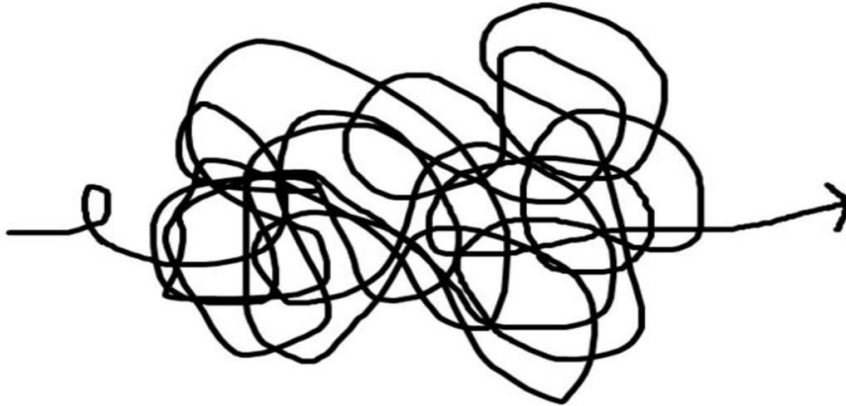


How we would like grief to be





## What grief is really like



Tips to help someone who is grieving.

Listen actively, let them talk and share the relationship they had with the deceased. Invite the person to talk about their loved one. Be prepared for some silences. Refer to things they have said, it shows that you have been actively listening. Realising you may not always be the best person to support them.

Remember that effective communication can be broken up like this.

- Words: 7%
- Nonverbal: 55%
- Tone Volume and inflection 38%

Empathy v Sympathy - [Brené Brown on Empathy](#)

Ensure that the person is not harbouring guilt when they had no options i.e., not being with that person when they died.

How can you bring a conversation to a close

- Ideally set a boundary at the start of a call/visit.

How can we protect ourselves?

- Realising it is not your grief.
- Observe and listen but do not carry that person's grief or take it on

Being aware of our own limitations

- Knowing your own constraints (time, hours, capabilities etc)

- Keep a check on how you are.
- can you help others? We all have a certain capacity - know yours

Useful literature

[ID205495 Age UK When someone dies September 2024](#)

[What to do when someone dies: step by step - GOV.UK](#)

## 19 Appendix

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Engagement tool kit

Microsoft service forms for reporting purposes

## 20.Document Control

Last Updated date	Updated by	Changes made	Date shared with staff and volunteers
01/07/2025	Joanne Asbury	TB, TC merged and GOF introduced	

This manual will be regularly reviewed. Feedback is welcome at any time to improve delivery service.

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For queries, contact: Companionship Team – [befriending@ageuknorfolk.org.uk](mailto:befriending@ageuknorfolk.org.uk) T; 01603 785 223