

# REASSURANCE PROGRAMS

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## **INTRODUCTION AND THE ACCREDITATION PROCESS**

REASSURANCE CONTACT is the service whereby, prearranged, daily telephone calls are made to elderly, isolated, or disabled persons by trained Reassurance Specialists. Centers offering this program to their communities do so in keeping with the particular standards set by CONTACT USA.

The public has a right to expect that REASSURANCE CONTACT services provided by a local Center are available as advertised and that the responses that a client receives are consistent with accepted standards for such services.

The standards for this service are in the areas of training, availability, service, and program management.

### **SECTION 3-R: TRAINING STANDARDS**

#### **A. BASIC TRAINING PROGRAM**

**RATIONALE:** Those who volunteer or are employed to provide a particular service have a right to expect that they will be given an adequate opportunity to acquire the requisite attitudes, knowledge, and skills and to integrate these into safe and competent practice. Clients have the right to expect to be heard compassionately, non-judgmentally, and confidentially, and to be assisted appropriately.

**STANDARD:** The Center's basic training program for persons who call clients by telephone is a minimum of four hours.

- Orientation
- Physical and Emotional Needs of Elderly, Homebound or Disabled People

- Self-Awareness
- Listening and Communication Skills
- Code of Ethics
- Program Policies and Procedures
- Emergency Procedures
- Grief, Loss, and Loneliness
- Depression
- Centers may add to these areas, according to their needs.

Each center shall have a Reassurance Policies and Procedures Manual which is readily accessible to Reassurance Specialists.

**Core Competencies:** The training program shall focus on demonstrable attitudes, knowledge, and skills in the following areas:

- Understanding the role of the Reassurance Specialist
- Understanding the program's policies and procedures
- Ensuring competent practice in the special techniques of telephone Reassurance work

**COMPONENTS:** The components of this standard include a minimum four-hour training program and specific training requirements that encompass the core competencies.

**Questions:**

1. Does the basic training program include the required hours of training?
2. Is the training focused on producing the knowledge, attitudes, and skills required for Reassurance Specialists?
3. Does the training program result in competent practice?

**Component 301-R: Four-Hour Basic Training Program**

- Level 0: \*\*The basic training program totals less than four hours.
- Level 1: \*\*The basic training program consists of a total of four hours.
- Level 2: The basic training program consists of more than four hours of training in the core competencies.
- Level 3: The basic training program is more than four hours and features experiential learning, supervised apprenticeship and expert presenters. Trainees evaluate the training.

**\*\* MUST ATTAIN LEVEL 1**

**Component 302-R: Specific Training Requirements on Core Competencies**

- Level 0: The basic training program does not provide minimal training requirements for Reassurance Specialists on required Core Competencies.
- Level 1: The basic training program is designed to encompass the core competencies and to provide instruction in the special techniques of non-judgmental, active listening, and emergency response.
- Level 2: The basic training program satisfies the requirements of Level I and reflects the needs of the community.
- Level 3: The basic training program satisfies the requirements of Level 2, and is modified and upgraded based on evaluations of the training program.

**Component 303-R: Demonstrable Competencies of Reassurance Specialists**

- Level 0: There are no written objectives for training.

- Level 1: The written objectives do not produce demonstrable competencies.
- Level 2: The basic training program focuses on enabling the trainees to demonstrate the knowledge, attitudes, and skills essential to provide Reassurance services.
- Level 3: A formal evaluation process demonstrates that Reassurance Specialists have integrated the necessary knowledge, attitudes, and skills into safe, competent practice.

## **B. QUALIFICATIONS OF TRAINERS**

**RATIONALE:** The effectiveness of a training program is influenced by all who participate in it.

**STANDARD:** Trainers have knowledge and skills appropriate for their roles.

**COMPONENT:** The component of this standard addresses the qualifications of the individual trainers or presenters.

### **Question:**

1. Are the trainers qualified?

### **Component 305-R: Trainers' Experience, Knowledge, and Skills**

- Level 0: Trainers lack needed experience, knowledge, and skills.
- Level 1: Some trainers have the needed experience, knowledge, and skills.
- Level 2: Most trainers have the needed experience, knowledge, and skills.
- Level 3: Trainers have exceptional experience, knowledge, and skills.

## **C. CONTINUING EDUCATION**

**RATIONALE:** Continuing education encourages the further development of skills and knowledge of Reassurance Specialists.

**STANDARD:** The Reassurance Program has established a continuing education program for Reassurance Specialists to help maintain their skills and knowledge. All active Reassurance Specialists participate in at least one continuing education activity annually.

**COMPONENTS:** The components of this standard are the provision of a program of continuing education and participation of all active Reassurance Specialists in the continuing education program. Relevant continuing education may include meetings, media presentations, readings, or classes.

### **Questions:**

1. Does the Program provide continuing education for Reassurance Specialists?
2. Do all Reassurance Specialists participate in at least one continuing education activity annually and is it documented?

### **Component 306-R: Continuing Education Program**

- Level 0: \*\*The center does not offer any continuing education.
- Level 1: \*\*The Center infrequently offers relevant continuing education.
- Level 2: The center regularly offers continuing education.
- Level 3: The center offers a variety of continuing education opportunities and encourages Reassurance Specialists to participate in other continuing education opportunities available in the community.

**\*\* MUST ATTAIN LEVEL 1**

**Component 307-R: Reassurance Specialist Participation in Continuing Education Activities**

- Level 0: \*\* Not all active Reassurance Specialists participate in at least one documented continuing education activity annually.
- Level 1: \*\*All active Reassurance Specialists participate in at least one documented continuing education activity annually.
- Level 2: All active Reassurance Specialists participate in at least one documented continuing education activity annually and more than 50 percent participate in more than one.
- Level 3: All active Reassurance Specialists participate in at least one documented continuing education activity annually and more than 90 percent participate in more than one.

**\*\* MUST ATTAIN LEVEL 1**

**SECTION 4-R: REASSURANCE SPECIALISTS' STANDARDS**

**RATIONALE:** Programs that rely primarily on volunteers to provide the services for which the organization was founded must become expert in the recruitment, training, and management of volunteers. Components 1004-1005 do not apply to programs that use only paid staff.

**STANDARD:** The Program is able to recruit and retain the number of Reassurance Specialists that it needs to provide quality services. Reassurance Specialists are supervised and their performance is evaluated annually. The Program maintains adequate statistics and recognizes the contributions of volunteers.

**COMPONENTS:** The components of this standard address recruitment, recognition, supervision, evaluation, record-keeping, and maintaining a sufficient number of staff.

**Questions:**

1. Does the Reassurance Program provide adequate supervision for its Reassurance Specialists?
2. Does the Reassurance Program provide adequate evaluation of its Reassurance Specialists?
3. Is the Reassurance Program able to recruit a sufficient number of Reassurance Specialists to replace those who have completed their service obligations?
4. Does the Reassurance Program provide volunteer recognition?
5. Is the Reassurance Program able to retain a sufficient number of Reassurance Specialists?
6. Are records on volunteers' service current?
7. Does the Program have a client waiting list?

**A. RETENTION AND RECRUITMENT**

**Component 401-R: Recruitment and Retention of Reassurance Specialists**

- Level 0: The Program does not have an adequate number of Reassurance Specialists to provide it's advertised service.
- Level 1: The Program has an insufficient number of Reassurance Specialists, but is actively recruiting.
- Level 2: The Program meets current clients' needs through collaborations and/or partnerships.
- Level 3: The Program has sufficient staffing to meet its advertised service without a client waiting list.

## **B. SUPERVISION**

### **Component 402-R: Supervision of Reassurance Specialists**

- Level 0: Reassurance Specialists are not supervised.
- Level 1: Reassurance Specialists receive informal supervision.
- Level 2: Reassurance Specialists receive formal supervision.
- Level 3: The Reassurance Program has at least one paid or volunteer person whose responsibility is the supervision of Reassurance Specialists.

## **C. EVALUATION**

### **Component 403-R: Evaluation of Reassurance Specialists**

- Level 0: Reassurance Specialists are not evaluated.
- Level 1: Reassurance Specialists receive informal evaluation.
- Level 2: The Reassurance Program has developed and uses a consistent system of annual evaluation of each Reassurance Specialist.
- Level 3: The Reassurance Program has a formal written system of evaluation of Reassurance Specialists including a plan for addressing deficiencies.

### **THE FOLLOWING COMPONENTS RELATE ONLY TO THOSE PROGRAMS THAT USE VOLUNTEER REASSURANCE SPECIALISTS.**

### **Component 404-R: Recognition of Volunteer Reassurance Specialists**

- Level 0: There is no program for volunteer recognition.
- Level 1: There is an informal program for volunteer recognition.
- Level 2: There is an annual, formal program for volunteer recognition.
- Level 3: There are on-going opportunities for volunteer recognition and participation in CONTACT USA national recognition programs (i.e. Mary Brown Society, Hernado Palmer Award, or the Spirit of CONTACT Award)

### **Component 405-R: Record Keeping of Volunteer Reassurance Specialist Statistics**

- Level 0: No records on volunteers' hours are maintained,
- Level 1: Records are maintained, but are not updated annually.
- Level 2: Records are maintained and are updated annually.
- Level 3: Records are maintained and updated monthly.

## **SECTION 5-R: REASSURANCE SERVICE STANDARDS**

**RATIONALE:** The public has a right to expect that the Reassurance Program is available as advertised and is administered in a competent and ethical manner.

**STANDARD:** The Program is adequately managed. Reassurance Specialists have direct access by telephone to clients. The service is provided in keeping with its statement of purpose without regard to age, gender, race, religion, sexual preference, or national origin. Centers have specific written policies and procedures regarding active intervention during emergencies, confidentiality and non-discrimination. Reassurance Specialists must have access to these written documents.

**COMPONENTS:** The components of this standard address Reassurance Program management, confidentiality, availability and adequacy of emergency response.

**Questions:**

1. Does the program have adequate management and supervision?
2. Are records of client needs, risk factors and emergency contacts kept up-to-date?
3. Does the Reassurance Program provide calls consistently at the scheduled times?
4. Do the Reassurance Specialists understand and follow the program's policies regarding emergency response?

**A. PROGRAM MANAGEMENT AND SUPERVISION**

**Component 501-R: Program Management**

- Level 0: No staff member or volunteer has the assigned responsibility for the management of this program.
- Level 1: A staff member or volunteer has the assigned responsibility for the management of this program.
- Level 2: The program administration includes periodic updates of client records, keeping of program statistics, and volunteer recruitment and management.
- Level 3: The program is evaluated annually and results are used to update and modify policies as needed.

**Component 502-R: Advertised Coverage**

- Level 0: \*\*Reassurance calls are not consistently placed at the scheduled times.
- Level 1: \*\*Reassurance calls are consistently placed as scheduled but the service is available less than seven days a week.
- Level 2: The Reassurance Program is available to place calls to clients seven days a week, but only during limited hours.
- Level 3: The Reassurance Program is available seven days a week, twenty four hours a day as requested by the client.

**\*\*MUST ATTAIN LEVEL 1**

**Component 503-R: Client Records**

- Level 0: Minimal records are kept and they are not updated.
- Level 1: Client records contain the client's name, phone number, address and information for at least one emergency contact. The information is not regularly updated.
- Level 2: Client records also include additional information about risk factors (medical, emotional, family or environmental issues that put the client at risk for an emergency) and more than one emergency contact. The information is updated at least annually.
- Level 3: Client records include the level two information and the Reassurance Program manager or other qualified staff completes a face-to-face assessment for every client. All records are reviewed at least every six months and updated as needed.

**Component 504-R: Risk Assessment Form**

- Level 0: Reassurance Specialists do not have a risk assessment form.
- Level 1: Reassurance Specialists have a risk assessment form, but it is not used consistently.
- Level 2: Reassurance Specialists use the risk assessment form on all calls as needed.

Level 3: Risk assessment forms are used consistently and are reviewed by the Program's designated parties and feedback is given to the Reassurance Specialist.

**Component 505-R: Policies on Intervention in Emergency Situations**

Level 0: \*\*The Reassurance Program does not have specific directives or policies for intervention in emergency situations.

Level 1: \*\*The Reassurance Program has informal policies and unwritten directives for intervention in emergency situations.

Level 2: \*\*The Reassurance Program has written policies and written directives for intervention in emergency situations. The Reassurance Specialists are trained on those policies during initial training. The policies are followed consistently.

Level 3: Intervention policies are reviewed annually and updated as needed. Continuing Education is offered annually on the intervention policies.

**\*\*MUST ATTAIN LEVEL 2**

**B. SUPPORT SERVICES**

**RATIONALE:** Reassurance Specialists on duty need access to support and assistance.

**STANDARD:** The Reassurance Program's response to human need includes provision of immediate support and assistance to Reassurance Specialists on duty. Support staff have been specifically trained to provide support and to assist the Reassurance Specialist in cases of emergency.

**COMPONENTS:** The component of this standard is a support system for Reassurance Specialists.

**Questions:**

1. Does the Reassurance Program have an adequate support system for the Reassurance Specialists on duty?
2. Are support staff trained?

**Component 506-R: Support System**

Level 0: There is no support system for Reassurance Specialists.

Level 1: There is an informal support system for Reassurance Specialists.

Level 2: There is a formal support system, but Support staff are not specifically scheduled.

Level 3: Support staff are always scheduled and available to Reassurance Specialists on duty.

**Component 507-R: Support Staff Training**

Level 0: No training is provided for support staff.

Level 1: Training is provided to support staff.

Level 3: Support staff are trained and receive annual continuing education.

**C. CONFIDENTIALITY AND ANONYMITY**

**RATIONALE:** Reassurance Specialists have the right to expect their identity and location to be protected appropriately. Clients have the right to expect their identity and information to remain private.

**STANDARD:** The Reassurance Program is responsible for defining and regulating matters of confidentiality and anonymity.

**COMPONENTS:** The components of this standard are policies and procedures regarding confidentiality, disciplinary action, anonymity of the Reassurance Specialist, and confidentiality of caller information.

**Questions:**

1. Does the Reassurance Program have policies and procedures regarding the confidentiality of both Reassurance Specialists and clients and anonymity of the Reassurance Specialist?
2. Does the Reassurance Program have guidelines for disciplinary action where needed?
3. Does the Reassurance Program have a policy governing client record retention and record destruction, which protects client confidentiality?
4. Does the Reassurance Program have policies specifically relating to off-site provision of services if applicable?

**Component 508-R: Policies and Procedures Regarding Confidentiality**

- Level 0: \*\*There are no policies and procedures regarding confidentiality.
- Level 1: \*\*There are policies and procedures regarding confidentiality.
- Level 2: \*\*Everyone who has access to and/or uses client information is required to sign a “Pledge of Confidentiality”. A signed copy of all confidentiality forms is on file.
- Level 3: Policies on confidentiality are reviewed annually and updated as needed.

**\*\*MUST ATTAIN LEVEL 2**

**Component 509-R: Policies and Procedures for Disciplinary Action**

- Level 0: There are no guidelines for disciplinary action if confidentiality is broken.
- Level 1: There are guidelines for disciplinary action if confidentiality is broken.
- Level 2: Disciplinary action is not consistently taken if confidentiality is broken.
- Level 3: The guidelines are followed consistently and reviewed annually.

**Component 510-R: Anonymity**

- Level 0: There are no policies or procedures regarding Reassurance Specialist anonymity.
- Level 1: There are informal policies and procedures regarding Reassurance Specialist anonymity.
- Level 2: There are written formal policies regarding the anonymity of Reassurance Specialists, but they are not always followed.
- Level 3: The written policies regarding anonymity are consistently followed.

**Component 511-R: Client Records Retention and Security (Hard Copy and Computer Data)**

- Level 0: There are no policies regarding client records retention. Client records are not in a secure location. Computerized data is not protected.
- Level 1: The Program has a client record retention policy for paper data OR computer data, but not both.
- Level 2: The Program has a client record retention policy for paper data AND computer data.
- Level 3: The Program reviews policies regarding client record retention annually and updates as needed.

**Component 512-R: Policies and Procedures for Off-Site Programs**

- Level 0: There are no written policies or procedures regarding off-site service provision.
- Level 1: There are some written policies and procedures regarding off-site service provision.
- Level 2: There are written policies and procedures regarding off-site service provision and a copy is available to every Reassurance Specialist.

Level 3: The written policies and procedures regarding off-site service provision are reviewed annually and updated as needed.

## **D. CALL STATISTICS**

**RATIONALE:** Statistics quantify the use and relevance of service.

**STANDARD:** The Reassurance Program keeps accurate and current call statistics that include a range of demographic information.

**COMPONENT:** The component of this standard is the maintenance of Reassurance call statistics.

**Question:**

1. Are Reassurance call statistics accurately maintained?

**Component 513-R: Call Statistics**

- Level 0: The Reassurance Program does not keep statistics.
- Level 1: The Reassurance Program has a process for keeping statistics, however the statistics are not consistent or current.
- Level 2: The Reassurance Program's call statistics are current, consistent and are updated monthly.
- Level 3: The Reassurance Program's call statistics are consistent, current, include relevant demographic data and are reviewed annually.