

Yad I' Yad
Congregation Beth Am's Bikur Cholim Society

Phone Call Guidelines

I. **Introduce yourself to the "visitee/callee" as a member of Beth Am**

- What you say next will depend on the reason for the call:
 - Bereavement
 - Illness
 - Isolation
 - Special Needs (disability, etc.)

e.g. For Bereavement or Illness:

I am (name) from Congregation Beth Am, I am part of Yad I' Yad committee and I was referred to you to check on you and express my concern and care regarding [the death of (name, relationship) or illness (theirs or other in their family)]

e.g. For Isolation or Special Needs:

I am (name) from Congregation Beth Am, I am part of Yad I' Yad committee and I was referred to you to be a friendly phone visitor. I am hoping to get to know you better and to see how we can be there for you as a caring community at Beth Am.

(If the person you are calling wants more information, explain the programs purpose to develop an outreach for all congregants to be there for them in times of need, to truly be a caring community for all Beth Am members.)

II. **Get to know the your callee/visitee:**

- Ask Open ended Questions (Use How or What questions – Don't ask Why?'s)
- Ask Clarifying Questions (Use paraphrasing, restatement or ask for further info.)
- Create Safe space (By being a non-judgmental, non-advice giving, caring and compassionate listener.)

III. **Establish Calling/and or Visiting Expectations:**

- How often and When you will call again (i.e. Phone call 2 x a month and maybe visit 1 x a month)
- Make clear and realistic expectations

IV. **Record Visit/Phone :**

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- Always record visits **asap** on the Yad l' Yad site (goes to Y/Y, C/C & clergy)
- If there is an issue of concern issue Y/Y report and **call** clergy