



**The Transition Network's  
Caring Collaborative  
2015**

# **QUICK START GUIDE TO CREATING A CARING COLLABORATIVE**

***Supported by a grant from the New York State Health Foundation***

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## FORWARD

**The Caring Collaborative (CC) model** is a framework for establishing “neighbor- to-neighbor” help and support. Like a “virtual village,” members mobilize themselves as a community and marshal their resources to support their members. The CC model does it through enabling member engagement, service exchange, education, and small group discussions.

Developed under a grant from the NYS Health Foundation, the model was designed so it could be replicated.

The members of TTN’s award-winning Caring Collaborative are part of an active constellation of women, organized by neighborhood in some Chapters, who are providing each other with “help-insurance” while establishing deep bonds. Living and aging in community is a priority of TTN, and TTN’s Caring Collaborative members can become a powerful resource for healthy aging.

Self-reported benefits of participation in CC include:

- Relief from the stress of worrying, “who will take care of me?”
- Pleasure of being part of a community committed to helping one another
- Heightened sense of well-being and competence

This manual shows how to leverage the power of informal communities to provide health-focused support by and for members. It provides a roadmap based on TTN’s experience, along with tips and tools developed along the way. The model can be scaled to fit the size and needs of your Chapter, and requires a minimal financial investment because it runs largely on human capital.

The *GUIDE TO CREATING A CARING COLLABORATIVE* is a more comprehensive version of this manual. In addition, TTN offers two other manuals: *CREATING A VERTICAL VILLAGE IN A HIGH-RISE BUILDING*, for creating a healthcare support network in apartment buildings; and *WHAT YOU NEED TO KNOW WHEN YOU GO TO THE HOSPITAL*, to increase understanding of the need to prepare for healthcare services.

The manuals are written in Microsoft Word and use Word’s standard table of contents. They can be modified and customized to your chapter’s needs. We do ask that, if you use these manuals, you respect our copyright and credit The Transition Network by keeping the copyright statement in the document. And, please let us know at *info@ttncaringcollaborative.org* how use of these materials assisted you to develop a caring collaborative.

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# The Caring Collaborative Model

*"I'm a very self-sufficient type, but I needed help that day--and I got it, thanks to the Caring Collaborative."*

The Caring Collaborative provides a framework for mobilizing and organizing the goodwill that resides within communities, such as bringing a home-cooked meal to a neighbor who is sick, or accompanying a friend to an outpatient procedure. Members benefit from the healthcare experiences of others, for example, knowing what to expect during breast cancer treatment, or how to optimize recovery following knee replacement surgery. And, it allows members to plan for that rainy day -- when an accidental fall or unexpected diagnosis can compromise their independence. There's tremendous comfort in knowing a network is in place where friends stand ready to lend a helping hand.

## ***Power of Informal Communities***

Research shows that social ties and connections can help people live longer, stave off memory loss, and improve outcomes associated with chronic diseases. Moreover, many people report that they would *prefer* to turn to a network of peers or friends for help with illness and/or disability than family members. Perhaps the strongest argument for community support comes from older adults themselves, 89% of whom say they want to grow older at home in their community.

TTN believes that informal communities are an untapped resource for many of the challenges confronting an aging society. In the next 20 years, there will be more people over age 65 than ever before. Yet, we are woefully unprepared to meet the health and social needs of a rapidly aging population. Largely ignored in discussions of potential solutions are informal caregivers - friends, neighbors, and members of social groups such as TTN – who have a vested interest in the health and wellbeing of the members of their communities. These informal communities can play an important role in supporting healthcare if they can mobilize and organize the support of their members.

## ***Building Blocks for a Caring Collaborative***

The Caring Collaborative has three discrete, health-oriented service programs:

- A Service Corps,
- A Member Information Exchange (MIX), and
- A Health & Wellness Resource Directory

In addition, it sponsors a strong program for health education that is promoted through **health and wellness seminars**, a **newsletter**, and **Neighborhood Group** meetings where members discuss timely health topics.

Recognizing that not all Chapters have the same resources at hand, the model was designed as a "menu of options," so that each can tailor a Caring Collaborative to the financial and community resources that are available, and the specific needs of potential

members. The basic elements of the CC model are briefly described below. A more detailed discussion is provided in the next section, *Getting Started*.

- **Service Corps** is a group of volunteers who deliver helpful services to members when illness or injury leads to temporary disability (escorts to healthcare providers, companionship, meals, etc.).
- **Member Information Exchange (MIX)** is a way for members to exchange information based on their experience relating to medical conditions or procedures. It offers a way to help members cope with illness or surgery, allay concerns, and support the decision-making process.
- **Health & Wellness Resource Directory** suggests links to a wide variety of information on health-related topics and on sources for obtaining outside services, such as food delivery, legal counsel, and home equipment.
- **Health and Wellness Educational** programs help members gain the information they need to maximize their ability to stay healthy and vigorous. The newsletter, *Caring Times*, reports on what's happening in the CC program and recent news on the health front. On the CC website and in these programs the focus is on practical strategies for staying healthy and independent.
- **Neighborhood Groups** meet informally in members' homes every month or so, to discuss health issues, to share information and local resources, and most importantly, to meet nearby members who will help them and whom they will help.

### ***Adapting The Model to Fit Your Chapter's Needs***

If your interested members live close by, you might start with a Service Corps since geographical proximity is a factor in a member's ability to deliver hands-on support. If your membership covers a wide geographic area, you might start with a Member Information Exchange since email and telephone communication can overcome the problems of distance. If you just want to organize information about the health services available in your community, the Health & Wellness Directory is the best way to start. Almost any group of members can arrange and present Health and Wellness programs in conjunction with local experts.

The TTN Chapter in San Francisco launched a small Caring Collaborative with just a volunteer Service Corps. Members who lived in the East Bay area wanted health-focused services that they could provide for each other as needed.

## Getting Started

*“It was a really wonderful experience to know that so many nice people were there to help me. Facing impaired mobility when living alone creates a whole other set of anxieties separate from health issues, and having my Neighborhood Group members there for me made a difference to my state of mind.”*

### **First Steps**

It doesn't take vast resources to start a Caring Collaborative. Like most new initiatives, you'll need one or two people with good leadership skills who can inspire and motivate others. This is perhaps the most important factor since leaders establish the vision and set the strategy for getting there. If you're reading this manual, perhaps that leader is you – or someone else in the Chapter who is enthusiastic, well liked, and respected.

Next, you'll need people to help you – a planning committee. The committee should be comprised of people who see value in a Caring Collaborative and have the time and tenacity needed to get a new project off the ground.

### **Financial Considerations**

You also need to think about available resources because they will likely inform the scope of your project. While the Caring Collaborative is a low cost model, you will need some financial and human resources to develop and operate the model. For example, in the TTN Caring Collaborative model, resources needed for operations include:

- Training materials
- Meeting space
- Staff to coordinate the program

Not every Caring Collaborative needs to hire a part-time coordinator – most rely on volunteers.

### **Gather Information**

Whether you decide to talk informally with members or poll your group using other methods, the following scenarios and questions can be used to inspire thoughtful discussions:

### **Build Scenarios**

Present the following situations to members:

1. *Suppose you fell and broke your leg. What is your emergency support system? What might you need? Who might help you manage until you were self-sufficient again?*
2. *Suppose you developed a life-threatening and/or long-term condition (i.e., open-heart surgery, cancer). How would you go about creating your support system? What might you need to think about? What would you need?*

Follow up with the following questions:

1. *What services do you think your members could provide in these different scenarios?*
2. *What kind of help would you be willing to contribute to a community support system?*

Take notes or record conversations so you can reference the feedback as you design the model.

Other steps to take include:

1. Look at the demographics of your group. What's the average age or age range? Where and with whom do they live? Are they working or retired? What's their overall health status? Do they drive or rely on public transportation? Are neighborhoods clustered or far apart?
2. Are members ready and willing to make a commitment to help each other through short-term episodes of illness/disability?
3. What type of resources do you have? Financial? Volunteers?

## **Customizing the Model**

The information you gather will inform the design of your Caring Collaborative and its size and scope of services. To help you get started, this section features more information about the core benefits – Service Corps, Member Information Exchange (MIX), Health & Wellness Resource Directory, the Health and Wellness Educational programs, and Neighborhood Groups.

The guiding principle is to select the Caring Collaborative elements that are realistic and manageable for your chapter. Remember, keep it simple and go slow – you can always build over time.

### **Service Corps**

A Service Corps is a group of members who have willingly agreed to deliver helpful services to other members when illness or disability strikes. It's comprised of four service categories – Home Tasks, Tasks in the Neighborhood, Medical Matters, and Escorts. Accessing volunteer service requires planning – generally, a minimum of 3 days' notice. The Caring Collaborative is not designed to provide 24/7 care or emergency assistance.

The Service Corps creates a framework for organizing support – offering solace and friendship after the death of a spouse, coordinating escorts to physical therapy after a hip replacement, or caring for a pet during a hospital stay. Some of the tasks members may be willing to perform are listed on the accompanying chart.

#### **Home Tasks**

Home-Cooked meal

Companionship (home and phone)

Pet Care  
Plant care  
Reading  
Sharing a Meal

### **Neighborhood Help**

Picking up prescriptions  
Shopping for groceries  
Food delivery  
Obtaining/returning library books

### **Medical Matters**

Taking notes at medical appointments  
Hospital visits

### **Escorts**

Taking to/picking up from hospital/outpatient care center  
Taking to and picking up from doctor's appointment

These categories can be adapted for your Caring Collaborative.

## **Member Information Exchange (MIX)**

*“When I was diagnosed with breast cancer, I was confused and frightened. It was so reassuring to talk to someone who had already been there and could offer guidance about my next steps.”*

Decisions about medical treatments, such as whether or not to have surgery for a chronic back condition, have a sizable impact on our lives. Making choices about medical tests, procedures, and treatments can be overwhelming, in part, because medical decisions are often complex. Personal connections are a lifeline for people who are sick, confronted with a scary medical diagnosis, or just looking for a new healthcare provider. Hearing from a peer who has gone through what you are facing may reduce anxiety and promote healthy coping, even if it's just learning how to put on socks after back surgery, or how to manage with an arm in a cast. Personal connections are also important for caregivers, who often need support and guidance in the functions they serve for others.

MIX facilitates the sharing of health information and resources within the Caring Collaborative community. This benefit provides a framework for organizing information members are willing to share about their own healthcare experiences. The goal is to support the individual decision making process in three key areas: Medical Conditions, Provider Selection, and Medical Products/Equipment that enhance comfort and mobility. MIX

does not give medical advice – members are instructed to share only their individual experiences.

Resource:  
MIX template

### **Health & Wellness Resource Directory**

When you're sick, injured or surprised by a new diagnosis, it's difficult to find information you need in a hurry. All sorts of questions may abound regarding the care you need; finding answers takes research skills and time you might not have.

The Health & Wellness Resource Directory was developed as part of the Caring Collaborative to help members cut through the clutter of health-related information and resources. It features information on an array of community-based programs that offer important services like Meals on Wheels, transportation, and home health aides. Information is organized by category, and a brief description of the program or service and important details like eligibility, costs and contact information are included.

In the CC model, the directory is web-based, with links to services. The directory complements other CC benefits by providing additional information, and links to services that volunteers may not be able to provide. For example, if a member asks a volunteer to perform a task she isn't allowed to provide or doesn't want to – like changing a wound dressing or cleaning the bathroom – the directory offers alternative resources.

The directory is organized according to the following categories:

- **Diseases A-Z** identifies national non-profit organizations that deal with various diseases and conditions, along with some explanatory notes. Where available, phone and internet contact information for local chapters and support groups is provided.
- **Home Food Services** describes ways members can obtain home food delivery on a short- or long-term basis. Websites and phone contacts are listed for restaurant, prepared food, and grocery delivery services, and not-for-profit agencies that deliver groceries or prepared meals.
- **Short Term Nursing and Rehabilitation Care** offers tips and strategies for selecting a facility that best meets your needs, including what to look for in the physical environment, facility licensing, staff credentials, activities, atmosphere, and quality of services.
- **Products/Aids/Devices** includes information for seniors and those with temporary or permanent physical impairments.

- **Transportation Assistance** identifies services that are available but often embedded within other categories of services, such as senior centers, caregiver resources, or home care services.
- **Doctor Information, Recommendations and Ratings** provides links to websites featuring physician information, specialties, credentials, references, and ratings. It's designed to serve as a consolidated reference point for further research.

Since the structure for a directory is in place, you can customize it to include local resources.

#### **Steps to Develop a Health & Wellness Directory**

1. Convene a volunteer committee to research and describe relevant community-based resources.
2. Decide whether you want to have a print or on-line directory. Engage design support as needed.
3. Review and update as needed, or at least once a year, to ensure accuracy of information

Resource:

Sample-NY H&W Directory

#### **Educational Programs**

Caring Collaborative members, typically, are interested in staying informed and independent. The Caring Collaborative is an ideal platform for delivering important information on health-related issues. The CC educational program includes health seminars, the *Caring Times* newsletter, and suggestions for discussion topics at neighborhood group meetings.

Creating an educational program can be done fairly easily. Poll members about topics of interest, then contact your local hospital, medical groups or alternative care providers for speakers. Many health practitioners (physicians, nurse educators, nutritionists) welcome an invitation to share their knowledge, and may even be willing to donate resources – meeting space, handouts, and discounted services.

- The **Caring Collaborative Health and Wellness Seminars** offer practical strategies for “healthy independence.” The focus is on “anticipatory guidance” that can delay frailty and disability – such as learning to avoid accidents and tips on how to get a good night’s sleep -- with a special concentration on staying healthy and vigorous.

- Offering the seminar in conjunction with a community health organization enhances the credibility of the Caring Collaborative.
- The NY Caring Collaborative's newsletter, **Caring Times**, includes articles on health topics, interviews with members pursuing healthy independence and examples of how people are benefiting from the Caring Collaborative. It not only educates members, it also builds interest in and awareness of the overall CC program. The newsletter is e-based and written by volunteers - a high impact and low cost service. A regular CC column in your Chapter newsletter can also serve these functions.

Resource:  
Sample-NY Caring Times

### **Neighborhood Groups**

If you're creating a Caring Collaborative for a large Chapter, consider organizing members by geographic area, i.e., by zip codes or neighborhoods. This is important for two reasons.

First, proximity is significant in the kind of help people are willing to provide for each other. Having your Service Corps volunteers organized by neighborhood will enable *local* service and information exchanges.

Second, the Caring Collaborative's Neighborhood Groups foster friendships. Your members may want a casual forum to meet and greet other Caring Collaborative volunteers. A familiar face makes it easier and more comfortable to ask for and give help. This casual meeting forum is also invaluable for sharing information on successful health strategies, to discuss important health issues, and to socialize. Groups of 10 to 15 members meet every month or so in a fellow CC member's home.

**Discussion Topics** for neighborhood groups are addressed to the health concerns of members. For example, you may see multiple requests for information on a similar topic – like osteoporosis or acupuncture. Members choose topics they want to discuss at their regularly scheduled meetings

Membership in a group is optional. However, it is an enormously popular part of the Caring Collaborative model in New York City.

Resource:  
Neighborhood Group Kit

### **Member Recruitment**

Once you've established a structure for your Caring Collaborative, you're ready to recruit members. A simple and effective strategy is to send an email to prospective members.

The email from the planning committee should describe the new initiative, explain how it can help members, and why they should join your Caring Collaborative. Use language and examples that will resonate with your members. For example, *Have you ever felt stranded or in need of support when confronted with an unexpected medical diagnosis? Or wondered who would walk your dog while you're in the hospital? Worry no more because the Caring Collaborative is here!*

Use every opportunity to publicize the launch of the Caring Collaborative. Create flyers to distribute at live events, newsletter articles, website banners and links, and press releases. Also, be sure to leverage the enthusiasm and influence of your planning committee members – word of mouth is a powerful communications tool.

Resources:

Membership template

Sample-CC Flyer

### **Membership Guidelines**

At first glance, it might not seem important to have guidelines about participating in a Caring Collaborative. After all, helpful exchanges are likely taking place in your community already. However, some benefits within the Caring Collaborative model are unique, and members will need some guidance. For example, many of us like to share information about our healthcare experiences, but there's a fine line between sharing information and giving medical advice. And agreeing to take or pick up someone from a medical appointment requires planning and commitment. It's important, therefore, to articulate the roles and responsibilities of members as soon as they join.

### **Orientation (Required)**

An Orientation program presents guidelines for participating in the Caring Collaborative. Information is presented during a two-hour meeting conducted by volunteers, and features interactive vignettes to convey core values. Topics covered include:

1. **Confidentiality** – Members participating in a Caring Collaborative have access to personal information about one another. This includes personal demographic information (address, phone number) as well as certain things that may be noticed during the course of a service exchange. For example, volunteers providing service in the home will be entrusted with all sorts of personal information, including the person's housekeeping capabilities and medication regimen. While most people would not intentionally divulge confidential information obtained during a health exchange, sometimes it happens by accident. This section provides an interactive skit to illustrate how it might happen – i.e., “Oh no, Julie can't come to that meeting – she's having a biopsy that day,” or “Speaking of clutter, you should see Julie's apartment.”
2. **Setting Boundaries** - As a volunteer in a Caring Community, members should recognize how to protect their own time and space – how to be considerate yet assertive. Recipients of services need to appreciate the generosity of volunteers and their

good intentions. For example, if a volunteer prepares a home-cooked meal, it's not appropriate to ask her to clean your floors or take out the garbage. Or, if a volunteer picks up groceries, she should be reimbursed for all costs incurred. Similarly, volunteers should never perform any type of medical care, like changing a bandage or administering medication.

- 3. Sharing information versus giving advice** - It's likely that most members of your Caring Collaborative will not have medical training, so giving advice is irresponsible and can be problematic. For example, a patient on certain medications may be at higher risk for bleeding than other people. Even casually suggesting that the person take an aspirin and go to bed could result in grave harm. This portion of the orientation program gives examples to illustrate the difference between giving advice and sharing information about your own experience.
- 4. Accompanying members to medical appointments:** One of the most important services within the Caring Collaborative is helping members navigate an increasingly complex medical system. Volunteers take members to and from medical appointments, visit them in the hospital, and take notes when they're meeting with healthcare providers. This section offers useful strategies for success, such as how to prepare the medical office staff (i.e., Consent to share information) and set expectations between the volunteer and service recipient. A discussion of HIPAA (Health Insurance Portability and Accountability Act of 1996) is provided and a list of common follow-up questions for healthcare providers is reviewed.

### **Statement of Membership Form**

At the end of each Orientation, a Member Agreement form is distributed. By signing the form, members agree to respect and adhere to the core values of the program discussed during the orientation.

Resource:  
Orientation Kit

### **Other Considerations**

This section describes the policies and procedures that can be used to help you develop your own guidelines.

Remember that joining and participating in a Caring Collaborative should be easy. If your policies and procedures are onerous and/or complicated, people will not join. Simplicity should be your guiding principle.

### **Who Can Join?**

All members of any Chapter of The Transition Network that has a Caring Collaborative are eligible to join. Participation is voluntary, and joining is an easy one-step process: Participating in the required Orientation.

## Liability Issues

TTN has organizational liability insurance, and the Caring Collaborative program is covered under that policy. TTN purchased volunteer liability insurance, and the Caring Collaborative is based on the principles of trust and reciprocity, which also act as a deterrent to abuse or misuse. TTN members are also encouraged to remember the spirit in which the Caring Collaborative was developed – as a promise to help each other through life's rough patches.

## Governance

Policies and procedures will be set by those who have oversight for the development and operations of your Caring Collaborative. The Caring Collaborative model is governed and managed by volunteers. A Steering Committee or Advisory Board will have oversight for program development, policies and procedures, service delivery, communications, and education. This committee should meet on a regular basis.

It's important that members feel they have a stake in their Caring Collaborative. Having a grassroots program – owned and operated by those who benefit – is important to a successful model.

## Communications

Engaging members of the community in any new venture requires an effective communications strategy. People need to know that a new program is available, how they can join, what types of services are available, and how they can benefit. Word of mouth is very effective, but so too are websites and newsletters.

For example, all materials relating to the Caring Collaborative in the NYC Chapter are posted on its website:

<http://www.thetransitionnetwork.org/chapters/chapters-ttn/chapters-new-york-city/chapters-new-york-caringcollaborative/>

Members can read about how other people are using the program, and access the Health & Wellness Resource directory.

E-mailed Newsletters are another method of communication. The New York CC's quarterly newsletter, **Caring Times**, raises awareness of the benefits of CC and encourages utilization. It features news about program events, neighborhood group meetings, health topics, and interviews with people who have used the services offered through the CC. You can tell the stories with names or, if privacy is needed, without names. The clear correlation between the newsletter's distribution cycle and utilization of the Caring Collaborative demonstrates its effectiveness.

## Resources

### Other Manuals:

- [\*The Guide to Creating a Caring Collaborative\*](#) is a more comprehensive version of this manual.
- [\*Creating a Vertical Village in a High-Rise Building\*](#), for creating a healthcare support network in apartment buildings
- [\*What You Need to Know When You Go to the Hospital\*](#), to increase understanding of the need to prepare for healthcare services
- [\*Orientation Kit\*](#)
- [\*Neighborhood Group Kit\*](#)

### Samples from NY:

- [Caring Times](#)
- [Health and Wellness directory](#)
- CC Flyer Page 16
- Letter templates Page 18

### Sample Templates:

- Service/MIX Request Log Page 20
- CC Member Master Database Page 21



## TTN's CARING COLLABORATIVE

*Interested in cutting edge health issues? Need a pick-up after a colonoscopy? Hoping for a personal referral to a cosmetic dentist? Then read on about the Caring Collaborative!*

**The Caring Collaborative (CC)**, a program within The Transition Network, is comprised of compassionate and vital women who are committed to encouraging one another to remain healthy and energetic. CC members support one another when medical issues arise and short-term assistance is needed. Creation of a CC in a chapter can employ one or more of the following components:

**A Service Corps** - The members offer to help CC colleagues who need temporary or occasional assistance in a doctor's office, coming home from the hospital, picking up prescriptions. They will shop for you, take you to medical appointments or perhaps, just provide good company or a helping hand while you convalesce.

### **Orientation**

The mandatory Orientation provides important information about how the systems work and about the process of giving and receiving help.

In the Orientation session, you will learn how your privacy and the privacy of others are protected; what the boundaries are - what can and cannot be provided; and about sharing experience not advice. You'll also learn how to access health-related information and help. You can get answers to your questions about CC, and meet other CC members.

### **CC Presentations**

Chapters can periodically hold presentations for members and guests. Accomplished practitioners discuss health and wellness issues with a special concentration on staying healthy and vigorous.

### **Member Information Exchange (MIX)**

MIX provides access to a wide range of health-related information, and an exchange of experiences with fellow CC members.

CC members who have had a particular health problem can share their experiences with other members and/or provide recommendations about health care providers.

If you have a new diagnosis, say, of high cholesterol or cataracts, you will be able to connect with another TTN member who has had a similar experience.

All information is confidential.

### **Neighborhood Groups**

Some Caring Collaboratives offer a network of women, organized by neighborhood, who pledge to be there for you. They are a place to build friendships with the people who will help you when you need it, and to feel comfortable asking for help.

Meeting in members' homes every month or so, they also offer an opportunity to discuss health topics of interest and share tips and information with other CC members who live near you.

**Please turn over →**

### **Health and Wellness Directory**

This contains web links to a wide variety of resources for health-related information such as Medical Condition and Illness Associations with their hot lines, and for other services such as rehab assessment advice, food delivery, transportation options, etc.

### **Regular Columns in the Chapter's Newsletters**

If the chapter has the capacity, regular articles on topics of health and well-being could be included, as well as any newsworthy events held by the CC.

### **Web Resources**

You can download from the TTN website the [Quick Start Manual on Creating a Caring Collaborative](#).

If YOUR Chapter is interested in exploring creating a Caring Collaborative, you can contact the following leads of the Caring Collaboratives already in existence:

**Long Island:** Carol Lioz or Rhonda Phillips at [ttnli.caringcollaborative@gmail.com](mailto:ttnli.caringcollaborative@gmail.com)

**New York City:** Nancy Gold at [nancygold212@gmail.com](mailto:nancygold212@gmail.com) or  
Barbara Stahura at [barbara.stahura@gmail.com](mailto:barbara.stahura@gmail.com)

**East Bay:** Janet Mandelstam at [jmand99@earthlink.net](mailto:jmand99@earthlink.net)

*"I'm a very self-sufficient type, but I needed help that day--and I got it, thanks to the Caring Collaborative."*

## Letter Templates

### **Blast for help**

Good afternoon,

I've recently received a request from a CC member for ....

**Date:**

**Time:**

**Duration:**

**Address at which to meet:**

**Neighborhood at which to be dropped off:**

**For help in the home: Pets, stairs, allergies, etc.** *(This one can most often be left off, but may be needed sometimes.)*

If you are willing to help, please let me know, and I will put you in contact.

Many thanks,

*(Sign with local contact person/coordinator)*

### **Letter to new members plus orientation**

Dear

Welcome to the Caring Collaborative program of The Transition Network!

There is a required orientation session for you to attend before you can use the services of the Caring Collaborative or join a neighborhood group.

The orientation will give you the opportunity to meet other members of the CC, and give you a more precise idea of everything the program has to offer. Most importantly, it provides a guide to the scope and boundaries of our responsibilities to each other when getting or giving help. We have orientations planned monthly.

Please go to the events page of your chapter and register for one.

*(Optional)*

After your orientation, you will be sent a list of our Neighborhood Groups. Please contact the facilitator of your chosen group to get on their mailing list.

Neighborhood groups give you the opportunity to get together with other CC members regularly, to exchange knowledge and practical information, meet new people, discuss various health-related topics, and listen to health experts.

For more information on the Caring Collaborative, visit our web pages by clicking on this link,

*(Insert local CC page URL)*

*(Sign with local contact person/coordinator)*

**Letter to oriented members re: Neighborhood Groups** *(With alternate versions of how to get into one)*

Dear

Welcome to the Caring Collaborative program of The Transition Network!  
While you are now part of the whole CC support network, you also may want to join one of our neighborhood groups.

Neighborhood groups give you the opportunity to get together regularly with other CC members who live near you, to exchange knowledge and practical information, meet new people, discuss various health-related topics, and listen to health experts.

Please send me your preferred neighborhood and your preference for daytime or evening meetings. I will connect you with the person in charge of the groups near you.

Or

You will be sent a list of our Neighborhood Groups. Please contact the facilitator of your chosen group to get on their mailing list.

For more information on the Caring Collaborative, visit our web pages by clicking on this link, *(Insert local CC page URL).*

*(Sign with local contact person/coordinator)*

### **Request for more info from helpee**

Dear

<b>To which neighborhood group do you belong?</b>
<b>On what date and at what time do you need help? (Include the number of hours needed, as best you can determine.)</b>
<b>At what address do you want the responder to meet you?</b>
<b>In which neighborhood do you want to be dropped off?</b>
<b>If you need help in your home, indicate if you have pets, stairs, allergies, etc.</b>

To better serve you, please answer the questions below:

Thank you,  
*(Sign with local contact person/coordinator)*

### **Letter blast for MIX info.**

Good afternoon,

I've recently received a request from a CC member for ...  
If you think you have helpful information to share, please let me know, and I will put you in contact.

Many thanks, *(Sign with local contact person/coordinator)*

### Sample Service/MIX Request Log

Date	General Topic	Requestor's Email Address	Requestor-First Name	Requestor- Last Name	Responder 1-First Name	Responder 1-Last Name	Responder 2- First Name	Responder 2-Last name	Total # of Responders	Comments
6/15/2015	Escort from Mt. Sinai ASU	<a href="mailto:AABrown@gmail.com">AABrown@gmail.com</a>	Ann	Brown	Susan	Jones	Linda	Smith	10	Match confirmed 6/17
6/21/2015	MIX Request - orthopedist who specializes in spine	<a href="mailto:AABrown@gmail.com">AABrown@gmail.com</a>	Ann	Brown	Susan	Jones	Linda	Smith	6	Sent Responses or List on File

*Sample* **CC Member Master Database**

<u>Last Name</u>	<u>First Name</u>	<u>Email address</u>	<u>Home Address</u>	<u>Home City</u>	<u>State</u>	<u>Home ZIP</u>	<u>Home phone</u>	<u>Mobile phone</u>	<u>Expiration date - TTN</u>	<u>CC Agreement on File</u>	<u>Date Attended CC Orientation</u>	<u>Neighborhood Group (If Available)</u>	<u>Completed Survey? (If utilized)</u>	<u>Administrative Comments</u>
Brown	Ann	<a href="mailto:AABrown@gmail.com">AABrown@gmail.com</a>	10 Main Street	NY	NY	10044	212 555-1010	917 888-2020	7/31/2015	X	2/25/2015	UES	NO	

