



Erasmus
SENIOR NETWORK

Friendly Phone Call Orientation

Waukesha and Milwaukee County

January 2024

Introductions

Waukesha County

Shannon Fogle

Program Manager

262-522-2405

Shannon.Fogle@Eras.org

Milwaukee County

Mary Robbins

Program Coordinator

414-488-6500 ext 6508

Mary.Robbins@Eras.org

Confirming Completion of Volunteer Hours and Portal Questions

Volunteer Team

414-488-6931

ADD THESE ERAS EMAIL ADDRESSES TO YOUR
SAFE SENDERS LIST IN YOUR SCHOOL EMAIL:

mary.robbins@eras.org

shannon.fogle@eras.org

Erasvolunteer@eras.org

** Check your school email often (daily) to ensure you don't
miss any communications

Eras Mission

Mission

- The mission of Eras Senior Network is to engage and support seniors, adults with disabilities, and family caregivers in leading meaningful lives.

Who we serve

- Independent
- Not enrolled in a Long Term Care Program
- Milwaukee County: Seniors (60+)
- Waukesha County: Seniors (60+) and Adults with Disabilities

Our Services: Transportation Assistance

- Medical Appointments
- Grocery Shopping (with and for client) and Grocery Delivery: stock box pick-up & food pantry
- Pharmacy and Bank
- We do not transport clients to social events, church, or non-life sustaining activities

Our Services: Home Assistance

- Spring and Fall Yard Clean-Up
- Yard Work
- Lawn Mowing (limited # of volunteers)
- Minor Home Repairs

Our Services: Social Assistance

- In-Home Friendly Visits (Waukesha)
- Friendly Phone Calls
- Birthday Phone Calls

Resources and Referrals

- Refer client to Eras for all:
 - Requests
 - Concerns
 - Questions
 - Resources
- Monday – Friday: 9 am – 4 pm (Except most major Federal Holidays)
 - Milwaukee County: (414) 488-6500
 - Waukesha County: (262) 549-3348

Friendly Phone Calls

Purpose:

- Decrease social isolation and create a sense of calmness to reassure our older adults and adults with disabilities that they are not alone.
- Determine any needs and to connect them with trained staff as needed.

Process: refer to provided forms

- Instructions
- Survey Instructions

Instructions: Please read carefully


Please make sure you have *read the instructions* on your own before making calls!

There is a lot of information to refer to so keep it handy *during calls*:


- Our goals
- Documentation of calls on portal
- Discontinuation of calls
- Conversation starters
- Refer clients to our main number for any needs

Helpful Infographics

Friendly Phone Calls Quick Reference




ALWAYS REACH OUT TO ERAS STAFF FOR CLIENT CONCERNS



1

Call Client


- Timing of call
- Be **persistent**
- Be **consistent**
- Keep conversation **positive**
- **Redirect** from difficult topics



2

Reminders


- Conversation is your main focus
- **Take notes** on things you want to remember
- **Establish** when next call will take place



3

Survey


- Complete survey for all calls & attempts
- Complete survey **same day**
- Multiple attempts made on the same day should be on one survey



4

The Unexpected

- If client has an **immediate** need, call Eras or advise client to call medical professionals or 911 if it is emergent
- **Refer** client to Eras for resources
- **Do not** attempt to solve issues client share



5

Repeat

- Use calendar to schedule next call
- **Reach out** to Eras staff with any questions

Client not answering?
Please make three attempts to reach them in a week. If they haven't answered after 2 weeks, let Eras know.


Attempts are logged as 15 minutes, you can get credit for one attempt/day.

Refer client to main line with any requests or questions.

Keep conversations pleasant, redirect if needed.


It's OKAY to end the call if past 30 minutes.

INSTRUCTIONS




[Tinyurl.com/FPCLInst](https://tinyurl.com/FPCLInst)

HOURS SURVEY



[Tinyurl.com/ErasLogin](https://tinyurl.com/ErasLogin)

TIPS & TRICKS



[Tinyurl.com/FPCLDoDont](https://tinyurl.com/FPCLDoDont)

MAIN PHONE LINES

Milwaukee County:
(414) 488-6500

Waukesha County:
(262) 549-3348

Helpful Infographics

 Friendly Phone Call Program	
 DO	 DON'T
 <p>Call clients weekly at the scheduled time. Agree upon this time with the client.</p>	 <p>Leave calls unscheduled and uncertain. Try to keep the schedule regular and at a good time for both of you.</p>
 <p>Submit a survey immediately after each call while you remember how long you spoke with the client. This way, Eras is able to report info accurately to stakeholders.</p>	 <p>Wait to submit a survey. Letting Eras know how the call went as soon as possible helps us stay compliant and up to date.</p>
 <p>Client mentions they need something? Refer them to Eras during the call and make a note in your survey of what you referred them for.</p>	 <p>Try to problem-solve for the client. Clients often need more help than you are able to provide. Refer them directly to Eras so we can assist as needed.</p>
 <p>Can't make calls anymore? Send us an email 2 weeks prior to ending calls.</p>	 <p>Unexpectedly stop making calls. Clients rely on this service and are expecting your call. Let Eras know as soon as possible if you need to step away from calling.</p>
 <p>ENJOY! Clients have a lifetime of stories and knowledge. Learn from each other and build a connection!</p>	 <p>Mention upsetting or negative subjects. Stay away from controversial topics like COVID-19, politics, personal problems, and personal beliefs. Stay positive and open to conversation.</p>
<p>ErasVolunteer@Eras.org • Milwaukee (414) 488-6500 • Waukesha (262) 549-3348 • Eras.org</p>	

Tips, Tricks and Highlights from the Instructions

- Establish a day/time to call: 15 to 20 minutes is the average call time
- Keep the conversation light - change the subject if it's uncomfortable
- Refer client to main phone number for appropriate county if they have questions, needs, concerns, or no longer want calls (also note in survey)
- Refer them to their doctor if health related, or if a medical emergency, advise client to call 911... *more in instructions*
- Conversation is your goal - any requests for any other services refer to us! We will problem solve with the client. Eras is open 9-4 M-F.
- No texting, no visiting – just phone calls

Tips, Tricks and Highlights from the Instructions

- Please be aware some clients have hearing issues - speak loudly and clearly and try to have little or no background noise. Please don't use speaker phone.
- Please give us 2 weeks advance notice if you are no longer able to make calls and let clients know they should expect another volunteer to call as soon as we are able to find and assign one.
- Fill out a survey the same day of each call AND attempted call.
- If you cannot reach a client after three attempts per week for two weeks, mention it in your survey and call/email Mary or Shannon directly.
- Please document in the survey if the client no longer wants calls – including a reason if they give you one.

Eras Web Portal

Complete a survey after every call or attempted call

1. Select Client Name
2. Date of call
3. Length of call
4. Contact the client?
 - a. Spoke with client
 - b. Left voice message
 - c. Not able to leave a voice message
5. If you did not reach the client, how many attempts did you make?
6. Any non-urgent concerns Eras staff should follow up on?
7. Brief overview of call
8. Is this client interested in continuing to receive Friendly Phone Calls?

Eras Web Portal

- Accessing The Portal
 - <https://eras.org/wp-content/uploads/1-Accessing-the-Portal.mp4>
- Retrieving and Resetting your Password
 - <https://eras.org/wp-content/uploads/2-Retrieving-and-Resetting-your-Password.mp4>
- Friendly Phone Call Survey
 - <https://eras.org/wp-content/uploads/6-Friendly-Phone-Call-Survey.mp4>

Call or email if you are having any issues with reporting your hours:

414-488-6931 / erasvolunteer@eras.org



Student Volunteers

- Complete survey in web portal - after EACH call and attempted call
- Hours = hours are calculated from the amount of time you record on each completed survey
 - Did not reach client = 15 min (maximum per day)
 - 4 clients = at least 1 hours per week
- Reflection questions: to complete at the end of the semester
- We will contact you at the email (please use your *school email*) you provided when you signed up as a volunteer.
- You can access this presentation at <https://eras.org/volunteer/friendly-phone-calls/>

Welcome and Thank You

- Thank you for choosing to volunteer at Eras Senior Network - *Welcome Aboard!*
- Please enjoy your conversations with our seniors and adults with disabilities!

Questions?

