

2-1-1 Quality Assurance Guidelines for Chat

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the fundamental
components of client-
centered community
resource navigation

Communication

1. **Demonstrated a willingness to help.**

Showed concern for client by using statements that indicate a desire to help (e.g., I can help with you that).

Why?

Demonstrating to a client that we are willing to help shows that we care about them and helps them feel comfortable to open up about their situations and needs.

When the score is "Yes"

- Specialist showed concern for client and their situation.
- Specialist used statements that indicate a desire to help.
- Specialist avoided discouraging or negative statements (e.g., "I'm going to be honest..."; "Here's the bad news..."; "You may be out of luck, but I can check...")

Sample Language

Client: "Hello, I'm looking for some food pantries in my area today."

Specialist: "Sure, I can look into finding some groceries for you. Do you have any food in your house right now?"

Tip

Use the Quick Reply, "I would be happy to help you with that." to save some keystrokes.

When the score is "No"

- Specialist failed to show concern for client's situation and does not express a willingness to help.

Sample Language

Client: "I'm looking for some food pantries in my area today."

Specialist: "I'm going to be honest - there aren't really any food pantries open on Sundays. I'll check for you, but you may have to wait until tomorrow."

It is not possible to score "N/A" on this component

2. **Demonstrated active listening.**

Specialist listened to the client and, through minimal encouragers, paraphrasing and/or questions/conversation demonstrated a full understanding of the initial reason for the client's contact prior to asking the demographic questions

Why?

Active listening is a structured form of listening and response that focuses attention on the client and details of their situation, both spoken and unspoken. This technique helps make the client feel validated, listened to and important. Active listening builds rapport that promotes mutual understanding and trust throughout the call. It also guides the Specialist in deciding what assessment questions to pose, what kind of assistance to search for, what resources to offer, and, when lacking resources, what types of alternate solutions might be welcome and appropriate.

When the score is "Yes"

- Specialist uses active listening techniques to build rapport with the caller. (Examples of active listening techniques are; minimal encouragers -"I see..." or "Sure..." to let caller know you're listening, reflection and paraphrasing is used to both bring out more information and clarify facts, effective pauses to encourage callers to elaborate' prioritizing needs and next steps with client, giving reassurance and encouragement.
- Specialist fully understands client's presented need before asking zip code or demographic questions.

Sample Language

Client: "Hello, I'm looking for some help with my gas bill. It's just been shut off and I don't have any money to turn it back on."

Specialist: "I'm sorry to hear that, but I'm glad you called. Can you tell me a little more about what's on with your gas bill?"

When the score is "No"

- Specialist does not acknowledge caller's particular situation
- Specialist parrots rather than paraphrases
- Specialist asks for zip code before confirming the client's need and initial desired solution

Sample Language

Client: "I'm looking for some assistance with my gas bill. It's just been shut off and I don't have any money to turn it back on."

Specialist: "I can look for that. What's your zip code?"

It is not possible to score "N/A" on this component

3. Attempted to establish dialogue and asked correct questions to determine client need(s).

Specialist continued using active listening techniques and critical thinking skills throughout the contact to acknowledge client's entire situation by asking open- and closed-ended questions to probe for more information. Specialist recognized, clarified and addressed any stated or unstated additional needs revealed in the course of assessment or conversation.

Why?

Establishing a continuous, meaningful dialogue with the client demonstrates interest and concern, while also revealing more about the stated need and opening opportunities to dig deeper into their situation to find any possible "hidden" needs that they may not immediately recognize. Is this a temporary situation? What is causing the client to have this presented need? Perhaps we can give referrals beyond the request that may offer longer term solutions.

When the score is "Yes"

- Specialist asked open- and closed-ended questions to find out more about client's situation and fully clarify the facts.
- Probed to determine unstated or underlying needs.
- Acknowledged and, given client's consent, addressed unstated or underlying needs

Sample Language

Client: "Hello, I'm looking for some help with my electricity bill. It's just been shut off and I don't have any money to turn it back on."

Specialist: "I'm sorry to hear that. I can help you find some resources that may be able to help with your electric bill. Can you tell me a little bit more about what's going on?"; "May I ask what happened to cause you to get behind on your bill?"; "May I ask how much you owe?"; "Do you have any income coming into your house"; "Is this the first time this has happened to you?"

Tip

There are a few Quick Replies that you can use to help establish dialogue. Including, but not limited to:

- How long has this been a problem for you?
- May I ask what happened that caused you to fall behind on your payments?
- I want to explore all avenues that could possibly be helpful. Could you tell me a little more about the situation and what happened?

When the score is "No"

- Specialist did not attempt to ask any questions to find out more about client's situation.
- Specialist did not try to probe to determine unstated or underlying needs.

Sample Language

Client: "I'm looking for some assistance with my electricity bill. It's just been shut off and I don't have any money to turn it back on."

Specialist: "I'm going to give you some information about E-HEAP."

It is not possible to score "N/A" on this component

4. Used appropriate tone and pace throughout the contact.

Remained welcoming, friendly and personable. Avoided overwhelming client with multiple questions in a single response. Allowed client to answer current question before sending additional questions. Limited number of words/characters sent in a single response. If necessary, employed strategies to focus/re-focus client on needs/resources and/or maintain control of the conversation/contact.

Why?

Remaining personable and warm makes clients feel they have reached the right person and place to help them. Using an appropriate pace for the conversation, which should be set by the client, allows the client to feel in control and gives them time to consider the options presented.

When the score is "Yes"

- Specialist remained friendly, patient and respectful throughout the contact.
- Specialist established and maintained a pace the client could easily follow.
- Specialist avoided sending lengthy responses.
- Specialist avoided overwhelming client with multiple questions in a single response.
- Specialist appropriately maintained or adjusted their pace and tone to help control the chat and move the client toward an actionable plan.
- Specialist politely refocuses client when he/she brings up new issues before the specialist and client finish addressing the initial request.

Sample Language

Client: My gas is off and I don't have the \$175 I need to get it back on.

Specialist: I am sorry to hear your gas is disconnected, but I would be happy to look for some programs that may help you get your service restored.

Client: I am also a week behind on my rent. My job only pays minimum wage. I really need to get some training so I can find something better.

Specialist: We can talk about options for rent assistance and job training, but it sounds like getting your gas back on is your most urgent need. How about we start by looking for some gas payment assistance programs and then we can talk about your rent and job training?

When the score is "No"

- Specialist rushed through demographic questions.
- Specialist asked a rapid-fire series of questions without pausing to allow the client to respond to each individual question.
- Specialist tone is condescending, unfriendly, harsh, argumentative or distracted.

Sample Language

Client: My gas is off and I don't have the \$175 I need to get it back on.

Specialist: I am sorry to hear your gas is disconnected. May I have your age and zip code and can you tell me if you are on PIPP, how far behind on the bill you are and what caused you to fall behind on your payments?

It is not possible to score "N/A" on this component

5. Used correct grammar and spelling; used short simple sentences, explained acronyms, avoided slang, emojis, SMS Language (text speak).

Communicated clearly to give structure to the contact and client's plan moving forward, choosing words the client could understand and keeping sentences as concise and meaningful as possible. Explained any program or agency acronyms (e.g., HEAP, PIPP, PRC, CEOGC, FPL) or colloquial abbreviates (The Centers, Cosgrove). Avoided excessive grammatical and spelling errors. Communicated without the use of emojis or SMS Language.

Why?

Using proper grammar, spelling and language increases our clients' ability to understand the information 2-1-1 provides. Offering context around acronyms clarifies the meaning behind oblique, potentially confusing names and concepts. These practices also show 2-1-1's high standard of skill, professionalism and customer service delivery, thereby, gaining trust and respect among community members and stakeholders. Using slang, emojis or SMS Language is too casual and may cause our clients to question our professionalism.

When the score is "Yes"

- Specialist used short simple sentences, avoiding rambling or unnecessarily heightened vocabulary.
- Specialist explained any acronyms and abbreviations for client's full understanding.
- Specialist avoided repeated errors in grammar and spelling.
- Specialist avoided using slang, emojis and SMS Language.

Sample Language

Specialist: "Okay, one program I've found is called PIPP, which stands for Percentage of Income Payment Plan. This program..."

When the score is "No"

- Specialist's sentences were long and complicated and confused the client.
- Specialist failed to explain acronyms when used.
- Specialist repeatedly used improper grammar and pronunciation.
- Specialist used slang, emojis and/or SMS Language.

Sample Language

Client is looking for rent assistance.

Specialist: "OMG! U ever heard of the PRC program @ JFS? I wanna tell u about what it does cuz it could maybe help with all the stuff u got going on. 😊"

It is not possible to score "N/A" on this component

6. Inspired confidence and trust.

Avoided tentative language (e.g., "I think...", "I'm not sure...", or "Well, it looks like..."); Avoided placing blame on software, co-workers, or the "system." If necessary, provided accurate

explanations of 2-1-1's structure, function, tools and procedures, avoiding phrases like "I'm not allowed to do that.", "That's just how it works", "We have to ask everyone this question", and "We need it for reporting."; If uncertain about information relating to an external resource or internal process, offered to pursue information for the caller, either immediately or via follow-up, and engaged the supervisor as necessary.

Why?

Delivering information with confidence inspires trust with our client. Conveying not just a willingness to help, but also confirming 2-1-1's ability to help - including confidence in our mission, processes, database, staff, software and hardware - ensures clients and external professionals believe in the reliability of the information they received. These practices also assert 2-1-1's ability to competently manage the information and infrastructure required to deliver first-rate community resource navigation to the community.

When the score is "Yes"

- Specialist avoided tentative language.
- Specialist conveyed confidence in their choice of words.
- Specialist did not blame software, co-worker, or the "system" when information seems unclear, referrals are taking longer than expected or more time is needed to investigate.
- Specialist accurately responded to client's questions about 2-1-1's process or database, or, if unsure of an answer, offered to find out for the client.

Sample Language

Client is frustrated that a particular program isn't in the database and asks why the specialist can't just Google it for them.

Specialist: "All the information 2-1-1 provides has been confirmed directly with program and agency staff to make sure we don't give out information that might be old or incorrect. If you'd like, I can contact the staff that updates our community resource database and have them look into this program, and then call you back with any information we confirm."; "We don't usually use the internet to get information for clients, but let me talk to my supervisor to find out if it's possible in this case or, if not, what we can do for you."

When the score is "No"

- Specialist used phrases like, "I think..." or "I'm not sure..."
- Specialist sounded unsure and tentative while giving referrals.
- Specialist blamed software, co-worker, or blamed the "system" when referrals are taking longer than expected.

- Specialist brushed off client questions with either incomplete or inaccurate answers, and/or did not offer to get an answer/more information for the client.

Sample Language

Client is frustrated that a particular program isn't in the database and asks why the specialist can't just Google it for them.

Specialist: "We're not allowed to do that. I have to use my system."

It is not possible to score "N/A" on this component

7. Was polite and courteous.

Generally demonstrated basic conversational etiquette by using words and phrases such as "May I," "Please," "Thank you," "You're welcome," etc.; sought permission to gain more information; used client's name if provided; attempted conversation to put client at ease.

Why?

Being polite conveys respect, emphasizes our professionalism creating a good impression for 2-1-1 and United Way. It also makes clients feel properly cared for and comfortable with our ability to assist them.

When the score is "Yes"

- Specialist used polite expressions such as "Please," and "Thank you."
- Specialist apologized if they misunderstood something that client said.
- Specialist used polite conversation when assessing, to make client feel comfortable.
- Specialist used client's name when provided.

Sample Language

Client: "Hello. I have an Energy Share appointment at the Salvation Army office you guys gave me last time I contacted you, but I lost the address. I think I left the paper buddy's car, and now he's in Kentucky visiting family. Anyway, the appointment's today, and I have all the documents. I just forget where I'm supposed to go. Can you look it up for me?"

Specialist: "I can definitely help you with that. I want to make sure I find the Salvation Army office that serves your area. Would you please provide me with your ZIP code?"

Client: "44105"

Specialist: "Thank you."

When the score is "No"

- Specialist missed opportunities to use polite expressions.
- Specialist did not apologize when they miss something client has said.
- Specialist did not make an effort to use polite conversation to make client feel comfortable.

Sample Language

Client: "Hello. I have an Energy Share appointment at the Salvation Army office you guys gave me last time I contacted you, but I lost the address. I think I left the paper buddy's car, and now he's in Kentucky visiting family. Anyway, the appointment's today, and I have all the documents. I just forget where I'm supposed to go. Can you look it up for me?"

Specialist: "Gimmie your ZIP code and age."

It is not possible to score "N/A" on this component

8. Showed empathy throughout the contact.

Related to client in an understanding way; acknowledged client's feelings; demonstrated concern and statements of encouragement; avoided statements of personal identification (e.g., "I know exactly what you're going through."; "I've been there.") and overly casual conversational reactions that could be construed as artificially heightened, flippant or dismissive (e.g., "Wow!", "That's a bummer", "That's messed up!", "Oh my god!")

Why?

Showing a client empathy allows us to form a working relationship, so that we can better assess and assist the client with their needs.

When the score is "Yes"

- Specialist related to the client.
- Specialist acknowledged and validates a client's feelings.
- Specialist used statements of encouragement to demonstrate that they care about the client.
- Specialist avoided both personalized and overly casual statements of empathy.

Sample Language

Client: "My wife recently passed away and now I am having trouble paying my bills. I'm feeling really stressed out."

Specialist: " I'm so sorry for your loss. I'm sure this is a difficult time for you. I can understand why you're feeling stress. I'm glad you reached out, and I'm going to do everything I can to help. Could you tell me a little bit more about the bills, and what's going on with them?"

When the score is "No"

- Specialist did not attempt to relate to the client.
- Specialist did not acknowledge and validate client's feelings.
- Specialist did not use statements of encouragement to demonstrate that they care and will take action for the client.
- Specialist used both personalized and overly casual statements of empathy

Sample Language

Client: "My wife recently passed away and now I am having trouble paying my bills. I'm feeling really stressed out."

Specialist: "Oh no. Can I get your zip code?"

When the score is "N/A"

- Client was a professional or other objective third-party without a direct emotional connection to the person in need's situation.
- Client's expression of need was, even after assessment, terse or business-like, and wholly absent of distress, anxiety, frustration, anger, sadness, or confusion.

Sample Language

Client: "I just need to know which food pantries are open."

Specialist: "Sure, I can help you find somewhere to go pick-up groceries. Do you mind if I ask you a little more about what's going on?"

Client: "Nothing's going on. I just want know which pantries are open so I can go pick up some food before it gets too late in the day."

9. Remains non-judgmental; avoided personal opinions, advice, religious, or political statements.

Avoided offering advice, judgmental statements, and personal opinion or disclosure; maintained objectivity regarding both the client's situation and the referrals provided.

Why?

An important AIRS Standard and basic concept in I&R is to be non-judgmental. This allows us to recognize a client's right to self determination, to judge for themselves based on their own values. This means that the client has the right to decide what to do about their situation. By refraining from giving advice and expressing personal opinions we are allowing the client to decide for themselves how they will handle their situation.

When the score is "Yes"

- Specialist remained non-judgmental, even if they disagreed with a client's decision or situation.
- Specialist avoided giving their own opinion or advice.
- Specialist avoided religious or political statements, even when the client made such statements.

Sample Language

Client: "I called Flamingos Foundation three times to try to get help with my electric bill, but they aren't calling me back."

Specialist: "I'm sorry to hear that. I can look to see if we have any other phone numbers listed for that program. If you tell me a little more about what's going on with your electric service, I can also see if there are any other agencies or programs that may be able to help. What would you like to do?"

When the score is "No"

- Specialist made statements of judgment about client's situation.
- Specialist gave their own opinion or advice.
- Specialist made religious or political statements.

Sample Language

Client: "I called Flamingos Foundation three times to try to get help with my electric bill, but they aren't calling me back."

Specialist: "Oh yeah - we get complaints about them all the time. They're terrible about getting back to people. I can try to find you something else, but next month maybe try saving money by

going to food pantries, so you can pay your electric bill. Food help is way easier to find than utility help."

It is not possible to score "N/A" on this component

10. Controlled silence gaps but also avoided irrelevant conversation.

Checked back with client within 60 seconds of silence or informed the caller ahead of time that there would be a silence gap and gave approximate length of time; kept client informed and engaged in the process; avoided small talk.

Why?

Controlling silence gaps keeps your client engaged. Reminding clients that you're working on finding them resources reassures them that you're there to help and makes them feel at ease about the resource navigation process.

When the score is "Yes"

- Specialist checked back in with client within 60 seconds of silence.
- Specialist anticipated that there might be a silence gap and acknowledged this to the client beforehand and provided the client with an approximate return time.

Sample Language

Specialist: "I'm still here. I just want to make sure I've explored all of the options. Thanks for your patience."

Tip

Use Quick Replies to check in with client and save some keystrokes. Quick Replies will be particularly helpful when handling two chats at a time.

When the score is "No"

- Specialist did not check back in with client within 60 seconds of silence or inform them that there would be a silence gap and give them an approximate time frame for return.
- Specialist did not keep client informed about what they are doing to assist them.
- Specialist did not acknowledge silence gaps.

Sample Language

Specialist has been silent for 60+ seconds.

Client: "Hello? Are you still there?"

Specialist: "Yeah. Hold on. I'm just reading this."

It is not possible to score "N/A" on this component

11. Used appropriate closing.

Used script with offer of further assistance; encouraged client to contact 2-1-1/other project again if referral does not work out; thanked client for contacting 2-1-1/other project. Where scripted closing is not appropriate, customized closing based on the outcome of the contact.

Why?

Prepares the client for ending the chat, ensures nothing has been left out and reminds the client to contact 2-1-1/other project again if the referrals do not work out, or if they have another related or unrelated need. Thanks client for contacting 2-1-1/other project to show we appreciate their business. A good closing ensures nothing has been left out and the client is comfortable ending the chat. Client is encouraged to contact us again if referrals do not work out and reminded they can reach out to 2-1-1/other project again if they need further assistance. This reinforces the service's constant availability, leaves clients with an impression of professionalism and brands our program name (2-1-1/other project).

When the score is "Yes"

- When appropriate, specialist asked if caller thinks they can take the next step.
- Specialist encouraged client to contact us again if referrals do not work out or, if no referrals are provided, if client wants to discuss other needs or potential assistance.
- Specialist thanked client for contacting 2-1-1/other project.

Sample Language

Specialist: "Do you think these 3 referrals can get you started? Is there anything else I can help with?"

Client: "That's good, you've been very helpful!"

Specialist: "I'm glad you feel you have enough information to move on. If those referrals don't work out or you need anything else you can contact us again anytime. Thank you for contacting 2-1-1!"

Specialist: "I'm sorry that wasn't anything available to help you at this time."

Client: "That's okay. Thanks for checking."

Specialist: "If there's anything else we can help you with in the future, please reach out anytime. Thank you for contacting 2-1-1!"

Tip

Use the closing from the Quick Replies to save keystrokes and guarantee points for this metric.

When the score is "No"

- Specialist did not ask if they could assist client further.
- Specialist did not thank client for contacting 2-1-1.
- Specialist did not encourage client to contact us again.

Sample Language

Client: "Thank you for your help today!"

Specialist: "No problem, have a good day!"

When the score is "N/A"

- Client disconnects or call is dropped before Specialist is able to deliver full closing.

Content

1. **Explained reason/provided context for asking demographic and other questions.**

Provided an accurate explanation for why any demographic or other assessment questions are being asked.

Why?

Giving an accurate explanation of why 2-1-1 Specialists ask certain demographic questions helps clients understand 2-1-1's process and ensures they don't feel that they are being interrogated or participating in a survey that is unrelated to the work of finding specific services to match their individual needs. Likewise, providing context around assessment questions helps build trust and rapport, and can reinforce a client's confidence in and understanding of 2-1-1's service.

When the score is "Yes"

- Specialist provided as correct explanation for demographic and data page questions using either scripted phrases or equally accurate personalized variations or paraphrasing thereof.
- Specialist offered context for any additional assessment questions or lines of inquiry.

Sample Language

Specialist: "Since programs serve different areas and ages, may I ask the ZIP code and age of the person who needs the service?"; "Sometimes there are additional services for veterans. Is anyone in the household a veteran or active military?"; "2-1-1 has a program that helps connect people to low cost and free prescription medications. Do you or does anyone in your household need assistance with the cost of prescription medication?"; "To make sure I find the most appropriate service for you, can you tell me a little bit more about what's going on with your electric service?"

When the score is "No"

- Specialist provided little or no explanation for asking demographic or assessment questions.
- Specialist provided incorrect explanation for asking demographic or assessment questions.

Sample Language

Specialist: "What's your zip code?"; "My system won't let me search unless I enter a zip code"; "We're asking all of our callers if they have health insurance."; "You don't happen to be a veteran, do you?"

It is not possible to score "N/A" on this component

2. Gave context for information and referrals before providing.

Narrated service search, walking the client through the process of prioritizing their needs and the subsequent search for resources. Clearly identified the type of service(s) (food pantries, gas service payment assistance, home rehabilitation grants, etc.) that could potentially meet those needs, including an explanation of the assistance each searched service generally provides. When suggesting a program, used the service description to provide an explanation of what that program offers to both setup referral and get client input as to the referral's appropriateness and desirability before offering contact, documentation or intake details.

Why?

Providing clear explanations of your process as you prioritize and conduct your search helps a client get a broader sense of what types of services may exist to address certain needs. It's also the first step in setting their expectations about the type of options you can help them explore as the two of you work toward a clear, linear plan. Conversation about the types of services available and the specific programs offering those services can also help encourage the client to reveal additional situational details, ask questions, or state preferences they may not have otherwise mentioned.

When the score is "Yes"

- Specialist provided information about the type(s) of service(s) they are trying to locate and explained how those services relate to the client's need(s).
- Before offering details about each program, specialist used the service description to setup what a program offers.

Sample Language

Specialist: "I'm going to start my search by seeing if there's a food pantry open today where you can pick up some groceries to bring home. After that, if you'd like, I can also look for a hot meal where you could sit down and eat dinner tonight."; "This food pantry says they provide a

three to four day supply of canned food, and may also have bread and dairy products depending on what types of donations they received."

When the score is "No"

- Specialist did not give context for referrals before giving the information.

Sample Language

Specialist: "I'm looking for something that could help."; "You need food? Hold on a second while I pull that up."; "I found something. It's called Scranton Rd. Bible Church and it's at 3095 Scranton Rd. You can walk in every Tuesday at 10:00am and pick up some food."

It is not possible to score "N/A" on this component

3. Resources and/or information provided was correct and matched client's need(s).

Provided accurate and appropriate referrals for the client's need(s) and circumstances; client agreed on the appropriateness and suitability of referral(s).

Why?

Accurate and appropriate information is the crux of community resource navigation. Facilitated by a thorough assessment and reinforced by a conversation about prioritization and planning, correct referrals to available resources are what client's need to solve their problem(s). Accuracy will ensure that 2-1-1 cements and maintains a reputation as a source of subject matter expertise, resource navigation acumen and correct, usable information. Accounting for client preference reinforces 2-1-1's objectivity. More importantly, it demonstrates a fundamental respect for each client's free will and right to seek help that fits not only their individual needs, but also their independent opinions, ideals, tastes, and lifestyles.

When the score is "Yes"

- Specialist gave resources that are appropriate for client's needs and circumstances.
- Specialist gave accurate information.

Sample Language

Specialist: "This utility payment assistance fund will pay up to \$150 of an outstanding electric bill as long as person receiving help can prove they are able to pay the remaining outstanding amount. If you owe \$230, that means you'd still be responsible for covering at least \$80 of your current balance. Does this sound like something that would work for you?"

When the score is "No"

- Specialist gave resources that the client is not eligible for and/or interested in.
- Specialist gave inaccurate information.
- Specialist did not make sure that the client agrees that the resources fit their needs and/or preferences.

Sample Language

Specialist: "This utility payment assistance fund will pay up to \$150 of you bill. You can call them at 216-908-1456."; "This service says they only help pay for prescriptions, rent, and furniture, but why don't you give them a call and see if they'll make an exception. It doesn't hurt to try."; I know you said you weren't interested in a loan situation where you'd have to pay the money back, but I want you to call this program anyway."

It is not possible to score "N/A" on this component

4. Provided appropriate level of detail on resource(s) offered.

Gave necessary detail and confirmed clients understanding; provided all relevant details from hours of service, required documents and how to access fields; amount of information given did not overwhelm client.

Why?

2-1-1's commitment to the creation and ongoing maintenance of a comprehensive community resource database is built on the notion that accurate, client-focused detail is what elevates information from merely helpful to empowering. The consistent inclusion of details like required documents and intake process as part of the community resource navigation process increases client comfort and encourages follow-through by providing clear expectations about service access and delivery. The provision of thorough, relevant detail during the referral process also aids clients in recognizing and making informed choices between programs and services. In considering how much detail to provide, you still must be sensitive to the client's ability to process and manage large amounts of complex information, being mindful not to overwhelm clients who present as vulnerable or with multiple needs. If clients feel overwhelmed there is a risk they will not or won't be able to follow through with seeking the help needed.

When the score is "Yes"

- Specialist gave all necessary details for client to receive services, discussing, at minimum, service hours, required documents and how to access.
- Specialist did not seem to overwhelm client.

Sample Language

Specialist: "The service I just described is located at 3012 Payne Ave. in Cleveland. They don't take appointments, so you can walk in any Monday beginning at 8:00am. They stay open until 1:00pm, but clients are seen in the order in which they arrive, and they only see the first 10 people, so they recommend that people arrive as close to 8:00 as possible. Do you have any questions about that? Okay, When you go, you'll need your driver's license or state ID, your social security card, proof of any income you receive, as well as a copy of your lease. Do you have all those documents?"

When the score is "No"

- Specialist missed information that is crucial for the client to receive services.
- Specialist gave too many details and seems to overwhelm client.

Sample Language

Specialist: "The service I just described is located at 3012 Payne Ave. in Cleveland. They are open every Monday from 8:00am until 1:00pm, and they don't take appointments so you can just walk in."; The service I just described is located at 3012 Payne Ave. in Cleveland. They see people on site. They are open every Monday from 8:00am until 1:00pm, but they're closed on the Fourth of July when that's a Monday, Labor Day and Memorial Day. The service is free unless you're from out of state, in which case there's a fixed fee..."

When the score is "N/A"

- Specialist completes the call without providing any referrals

5. Provided key resources to client and offered options when available.

Made referrals to all programs/services necessary to best (meaning most directly and comprehensively) address client's needs (including initially unstated uncovered through conversation with Specialist); offered three referrals per service type whenever possible.

Why?

It's crucial that 2-1-1 helps direct clients down the most direct and effective path towards resolving their needs. This means discussing any programs that could assist the client, and making all key/necessary program referrals possible based on a client's situation, eligibility, and preferences. Ensure that any service term related to your client's need is considered as resources are located, and that, when possible, at least three referrals are provided for each of the mutually agreed upon service terms.

When the score is "Yes"

- Specialist reviewed several resource options that are applicable to each of client's identified needs
- Specialist worked with client to identify and provide referrals to key resources as dictated by client situation, eligibility, and preferences
- Specialist gave three referrals when possible

Sample Language

Specialist: "Let's talk about some different options to make sure you're able to eat. I can help you find a nearby food pantry where you could pick up groceries to bring home. I can also see if there are any hot meals where you could sit down and eat prepared food."

Client: "I just want to hear about the pantries right now."

Specialist: "Okay. Let me tell you about a few different pantries in your area that open today and tomorrow..."

Specialist: "Now that you have information about those pantries, may I ask if you currently have an Ohio Direction card to give you access to food stamps?"

Client: "I don't. How does that work?"

Specialist: "I can tell you how to apply..."

When the score is "No"

- Specialist missed a key resource for a client's situation.
- Specialist did not give three referrals when possible.

Sample Language

Specialist: "Let me tell you about a food pantry that's open today."

Client: "Okay."

Specialist: "Also, if you aren't on food stamps, you should find out if you're eligible. I can get you to a Benefit Bank site where that can check your eligibility and see if you qualify for any other programs at the same time!"

When the score is "N/A"

- Specialist completes the contact without providing any referrals

6. Provided resource information based on content, not personal or other external opinion/knowledge.

Relied solely on information included in 2-1-1's Community Resource database for all service-related details provided.

Why?

Clients should expect to receive the same service information for any given program regardless of which Specialist they reach, and that information should represent details that were directly gathered from and confirmed by staff of the agency/program in questions. (Specialists who have information about local programs that is not reflected in Refer are encouraged to send the information via transmittal to the resource department so that it can be considered, researched and vetted for database inclusion and use by the entire 2-1-1 staff.)

When the score is "Yes"

- Specialist gave resource information directly from the 2-1-1 database and not from personal knowledge.

Sample Language:

Specialist: "...the distribution is between 8:00am and 1:00pm, and they serve the first 50 people who arrive. To make it more likely that you'll receive service, they recommend that clients arrive as close to 8:00am as possible."

When the score is "No"

- Specialist gave resource information that is not in the 2-1-1 database.
- Specialist gave resource information without looking in the 2-1-1 database.

Sample Language

Specialist: "...the distribution is between 8:00am and 1:00pm, and they say they serve the first 50 people who arrive. To make it more likely that you'll receive service, they recommend that clients arrive as close to 8:00am as possible. My friend works there, and she says people start lining up at 6:00am, so I would get there around 5:30 if you want to make sure you're served. Especially because she also told me that they've been having to turn away even some of the first 50 because the agency's so short on funding."; "I don't see anything like that in my system, but I can Google it for you."

It is not possible to score "N/A" on this component

7. Confirmed client's understanding of each resource provided.

Engaged with client throughout each service referral to confirm their understanding of agency/program details as they are provided. Offered additional details when needed to confirm client's understanding or answer any questions.

Why?

Ensuring that a client understands the details surrounding each resource as the resource information is provided helps to ensure that they are as comfortable and prepared as possible to successfully follow through with referrals. Intermittent confirmation of a client's understanding also encourages the client's ongoing input and participation in the referral process and may result in the identification of additional needs or help determine the appropriateness of a follow-up call.

When the score is "Yes"

- Specialist engaged with the client throughout each referral, asking clarifying questions to ensure the client understood and is comfortable following through with all the information provided.
- Specialist clarified any misunderstandings and gave additional information as necessary.

Sample Language

Specialist: "To access this service, clients can walk into the office Tuesdays and Thursday between 9:00am and 4:00pm. Do those times work for you?"

Client: "Yeah. That means I can go tomorrow morning"

Specialist: "That's right. Now, when you walk in, you'll need to bring a government-issued photo ID and a proof of residency, like a recent utility bill. Do you have those to bring with you?"

When the score is "No"

- Specialist failed to make sure that client understood the information provided.
- Specialist did not clarify a misunderstanding that the client had.

Sample Language

Specialist: " To access this service, clients can walk into the office Tuesdays and Thursday between 9:00am and 4:00pm, and you need to bring a photo I.D. and proof of residency. Was there anything else you needed help with?"

It is not possible to score "N/A" on this component

8. Client had a clear plan to move forward.

After providing referrals and prior to ending the calls, walked client through a chronological step-by-step summary of the plan created by the client and the Specialist; Confirmed client feels they have enough information to undertake the plan.

Why?

The process of assessment, need identification, and resource referral is often complex, spanning multiple requests, needs, agencies, and services. It's easy to forget that when a client gets off the phone, they will have to take all that multifarious information and put it to use as they either pick up the phone again, get on the bus or go online. It's vital that, in addition to getting a client the information they need, the Specialist also works with them to ensure that they're comfortable using that information and have an ordered, prioritized approach for contacting agencies, applying for programs, and resolving their problem without further unnecessary frustration or duress.

When the score is "Yes"

- Specialist made sure that client had a clear idea of their ordered plan to access services by working with the client to review the steps they are going to take.
- Specialist made sure that client felt closer to a resolution.

Sample Language

Specialist: "Okay, I gave you several food pantries that should be open today so you can make sure you have some food in your house. After that, you were going to go to Job and Family Services' website to look at the application for the Ohio Direction card. If you have trouble filling out the application, you can call the number I gave you at the Food Bank to either get

assistance filling it out or have someone complete and submit the application for you. Do you have any questions about any of that?";

When the score is "No"

- Specialist did not walk client through an overview of their plan
- Specialist did not make sure that client felt closer to a resolution.

Sample Language

Specialist: "Okay, I've given you several resources to help you get food. Thank you for calling 2-1-1!"

When the score is "N/A"

- The client's plan doesn't include more than either a single referral or a single mutually agreed upon step or action.

9. Offered a follow up with client, if applicable.

Recognized when follow-up is needed based on 2-1-1 follow-up policy; gathered call back information; established estimated time of return call.

Why?

Following up with a client in crisis or with a complex need is important in community resource navigation so that we can make sure that client ultimately receives the services they are pursuing. Follow-ups may also provide an opportunity to provide advocacy on behalf of the client or reveal changes to the social service landscape that require investigation by the resource department. Follow-up is also the best and, usually, only way to construct any quantifiable measure of 2-1-1's success at providing clients with accurate, usable information.

When the score is "Yes"

- Specialist recognized a situation, based on 211's follow-up policy, that calls for a follow-up and asked client's permission to do so.
- Specialist appropriately gathered client call back information.
- Specialist and client agreed on an estimated time of return call.

Sample Language

Specialist: "Thank you for giving me your call back information. I will be calling you back

within two days to make sure you were able to get some food and see if you were able to make any headway on that utility issue. Is there anything else I can help you with at this time?"

When the score is "No"

- Specialist missed a situation that should have had a follow-up.
- Specialist did not gather client call back information.
- Specialist failed to provide an estimated time of return call.

Sample Language:

Specialist: "Great. I saved your phone number so I can get back to you. Is there anything else I can help you with at this time?"

When the score is "N/A"

- The client's situation did not meet the follow-up requirements described in 2-1-1's follow-up policy.

Procedure

1. **Appropriately gathered customer demographic information.**

Asks and confirms zip code, age, and other pertinent information (e.g., vet status, insurance status, etc.) required to perform an accurate and proper search.

Why?

The demographic information that we collect can help us find the most fitting resources for the person in need's situation and performs an initial eligibility-based filtering of Specialist's search results. Because of this information's importance to the accurate search functionality of Refer, it is the expectation that all questions are asked on each call except in cases where the client's mental or emotional state, and/or the severity, complexity, or immediacy of the problem, preempt the collection of any information that does not directly aid in addressing the client's need. In such situations, asking unnecessary demographic information could damage the trust and rapport established between the client and specialist, creating the incorrect perception that 2-1-1's primary concern is data gathering rather than one-on-one resource navigation.

When the score is "Yes"

- Specialist collected all relevant demographic information for the person in need as appropriate. (Expectation is that all demographic and contact data questions are asked on every 2-1-1 call that does not involve an immediate crisis or a caller in an obviously heightened emotional state.)
- Specialist clarified and confirmed that all information they collected was accurate.

Sample Language

Specialist: "Sometimes there are additional programs for veterans, are you or is anyone in your household a veteran or active military?"

Client: "My dad is a veteran."

Specialist: "Does your dad live in the household with you?"

Client: "Yes, he is a disabled veteran and I am his primary caregiver."

Tip

Use Quick Replies to save keystrokes.

When the score is "No"

- Specialist did not collect all relevant demographic information for the person in need.
- Specialist did not confirm that information they collected was accurate.

Sample Language

Specialist: "So you're looking to get some holiday toys for your grandchild. I can help you with that. Can I ask you how old you are?"; "I'm so sorry for your loss. While I search for bereavement counseling, how'd you hear about 2-1-1?"

It is not possible to score "N/A" on this component

2. Correctly recorded demographics and other information in ReferNET.

Entered all data, including referral and non-referral actions, according to protocol.

Why?

It's important to accurately record demographic and referral data (including unmet needs and unmet need reasons) for reporting purposes, as well as to make sure we're consistently providing the person in need with resources that match their age, residency, gender and other relevant individual circumstances, history and traits.

When the score is "Yes"

- Specialist recorded demographics and other information completely and correctly in Refer.

When the score is "No"

- Information recorded within transaction record is either incorrect or incomplete.

It is not possible to score "N/A" on this component

3. Used canned responses appropriately.

Selected canned responses that appropriately fit into the conversation or edited canned responses to fit the conversation.

Why?

Canned responses can be helpful with saving keystrokes and time, but when they sound canned rather than personalized, it can give the client the impression that they are either communicating with a chatbot, or someone who is not really paying attention to what they are saying.

When the score is “Yes”

Specialist selects appropriate canned message and/or edits it as necessary before sending.

Sample Language

Client: I am completely out of food and I need to know where I can get some groceries today.

Specialist: I am sorry to hear that, but I would be happy to help you locate some food pantries. Since different programs serve different areas and ages, may I ask for your zip code and your age?

When the score is “No”

Specialist sends canned message without ensuring it sounds like a personal response.

Sample Language

Client: I am completely out of food and I need to know where I can get some groceries today.

Specialist: Since different programs serve different areas and ages, may I have the zip code and age of the person who needs assistance?