

211/Navigate Dynamic FOLLOW-UP Survey

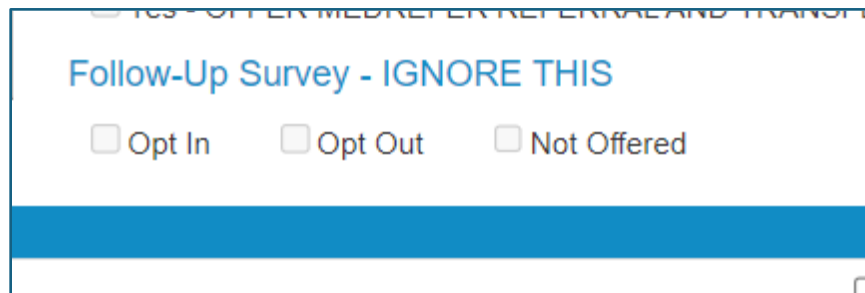
1. The Offer

*Keep in mind that you only need to make the offer on CUY contacts with the Standard 211 Call type where you've made at least one referral. Contacts from other areas/projects or with only contact/site reasons or unmet needs are not eligible for the survey.

Sample language:

"Would you like us to follow-up with you by text or email in [] days to find out if you were able to get connected to help?"

"We're trying out a new feature that lets us follow-up with callers over email or text to check in and see if they were able to get connected to help. Would it be okay if we checked back in with you in about [] days."



Follow-Up Survey - IGNORE THIS

☐ Opt In ☐ Opt Out ☐ Not Offered

Please mark this on every contact so we have the most accurate sense of both the opt-in/opt-out rate, and the number of contacts on which a Specialist decides it wouldn't be appropriate to make the offer. It's totally at your discretion whether you offer or not, but it would be helpful if you could informally keep track of any trends or themes around opt-outs and decisions to forego the offer.

2. Scheduling the survey

Schedule a Follow-up

☒ Follow up with Client

☐ Follow up with Contact

Schedule Date

Schedule Time OR

Follow Up Method

Select Dataform

Follow Up Type

Assign Staff

Follow Up Service List

- ☒ General Counseling Services
- ☐ Child Custody/Visitation Assistance
- ☒ Guardians ad Litem

Follow Up Schedule Notes

Client Name: This can be either the first or first and last name of the client. Keep in mind that whatever is in this name field is how the survey will address the client, so it’s important that you confirm the spelling.

Phone/Email: The contact method and recipient for the survey link

Follow-Up Service List: You MUST pick at least one need from the Follow-Up Service list or the survey will go out blank. For each need you select, the survey will include each referral made for that need. Generally, it is fine to just select all the needs from the contact, but if you feel that the number of referrals provided for one or more needs would create an overly daunting or inconveniently lengthy follow-up survey, feel free to limit your selection – just make sure the client understands which referrals will be included in the follow-up so they aren’t confused when they receive the survey.

Date: The date you want the survey to go out. There is no set rule for how far in advance to schedule, but your decision should be based on the approximate length of time it will take for the client to access the referred services. For example, if the client is just going to access a food pantry tomorrow, you can probably schedule the follow-up for a couple days in the future. If, however, the client is applying for cash assistance that could take up to 10 days to receive, you’ll probably want to schedule the survey for a couple weeks in the future. As with the needs, just make sure to share the date with the client when as you’re scheduling it.

Time: Because it’s an email/text, you can generally just choose “Anytime” from the general time of day menu after the OR. RTM has controls in place to ensure texts are not sent overnight.

Method: The dynamic follow-up survey is only available to email or text.

Select Data Form: This option will only appear if you have selected email or text from the Method menu. Currently, the only option here is the Closed Loop Web Survey. This is the one. Make sure to select it.

Agency Staff: Ignore this

3. The Survey:

*This section is for informational purposes in case the caller has questions about to expect.

Here is an example of the survey the client would receive based on the above contact.

Hello, Matt. You contacted 2-1-1 on 4/22/2024 2:09:00 PM, and we wanted to check in with you to find out if you got the help you needed. This should only take about a minute. (Your survey confirmation number is 4317251.)

Q1. When we talked, we referred you to at least one local organization. Which agency or agencies from the following list did you contact or try to contact?

- ☐ CLEVELAND CLINIC FOUNDATION - SOLON FAMILY HEALTH CENTER - General Counseling Services - Located at: 29800 Bainbridge Rd., Solon OH 44139 (440) 519-6800
- ☐ CUYAHOGA COUNTY COMMON PLEAS COURT - JUVENILE DIVISION - CLERK'S OFFICE - Guardians ad Litem - Located at: 9300 Quincy Ave., Cleveland OH 44106 (216) 698-8400
- ☐ HARVARD COMMUNITY SERVICES CENTER - General Counseling Services - Located at: 18240 Harvard Ave., Cleveland OH 44128 (216) 991-8585
- ☐ None of the above

This first page will list each agency, including the service need and address, to which the client was referred for the needs selected for inclusion in the survey. The next page generates based on the selections they make. For this example, assume they select all three.

Hello, Matt. You contacted 2-1-1 on 4/22/2024 2:09:00 PM, and we wanted to check in with you to find out if you got the help you needed. This should only take about a minute. (Your survey confirmation number is 4317251.)

Q2. So you contacted CLEVELAND CLINIC FOUNDATION - SOLON FAMILY HEALTH CENTER. Did you receive help with General Counseling Services?

- ☐ Yes
- ☐ No
- ☐ Nevermind, I didn't contact them

Q2. So you contacted CUYAHOGA COUNTY COMMON PLEAS COURT - JUVENILE DIVISION - CLERK'S OFFICE. Did you receive help with Guardians ad Litem?

- ☐ Yes
- ☐ No
- ☐ Nevermind, I didn't contact them

Q2. So you contacted HARVARD COMMUNITY SERVICES CENTER. Did you receive help with General Counseling Services?

- ☐ Yes
- ☐ No
- ☐ Nevermind, I didn't contact them

On this page, for each agency they indicate they contacted, it asks if the client received help. If they select No, they will see the following menu of reason selections:

I'm sorry to hear that. Can you tell us why you weren't able to access help?

{Select Option} ▼

- {Select Option}
- I am still working with the agency but haven't received help yet
- They did provide some help, but not enough
- Agency did not answer phone/email or did not return call/email
- Agency said they are not currently offering that assistance
- Agency said I was ineligible for assistance
- After learning more about the program, I decided not to apply.

COUNTY COMMON PLEAS COURT - JUVENIL
and Litem?

If the client selects No for any reason on at least one agency, they will next receive the following offer to schedule a telephone follow-up (if they select only Yes, Nevermind, or a combination thereof, the survey ends with a basic Thank You message):

Q4. Would you like a live 211 Specialist to call you during the next week to talk more about possible options for help?

☒ Yes

☐ No

Date I would like to be contacted:

[Next](#)

If the client answers Yes here and selects a date, it will create a new phone follow-up for the Specialist associated with the original survey follow-up.