211 San Diego Client Satisfaction Survey Protocols

1. Client calls 211. Information & Referral Specialist performs assessment with client, closes assessment and asks client if they would like someone to follow up with them within 10 days to see if they got the services they needed. Calls that require complex involvement by 211 staff are automatically marked for follow-up. These calls include 211 staff contacting agencies on behalf of clients and advocacy calls. Crisis calls are automatically marked for follow-up and are called back within 72 hours.

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2. Call Specialist documents the type of client (English/Spanish/Agency Contact), their name, and phone number or e-mail address and enters the information into the 211 database.

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3. 211 QA Coordinator runs a report from the 211 database and enters the client information into an excel tracking sheet.

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4. QA Coordinator gives the tracking sheet to the volunteer(s) to perform the client satisfaction survey calls.

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5. Volunteers call clients, marking the client tracking sheet when a survey is completed as well as tracking the client contact status through the contact status sheet.

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6. Volunteers enter all survey information into the online Survey Monkey Client Satisfaction survey tool.

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7. 211 QA Coordinator monitors Survey Monkey input data for accuracy. After six months of collecting data, 211 QA Coordinator sends Survey Monkey data to Harder & Company for evaluation.

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8. Harder & Co consolidates 211's raw client satisfaction data into an easy-to-read report and evaluates such things as client demographics, top needs, satisfaction of referrals provided by 211, satisfaction with 211 customer service, and outcomes.

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9. Harder & Co works closely with 211 QA Coordinator to edit and finalize the Client Satisfaction Survey report for each 6 month period. 211 then uses information provided in the follow-up report to make any necessary adjustments to operations or to the Client Satisfaction Survey process.