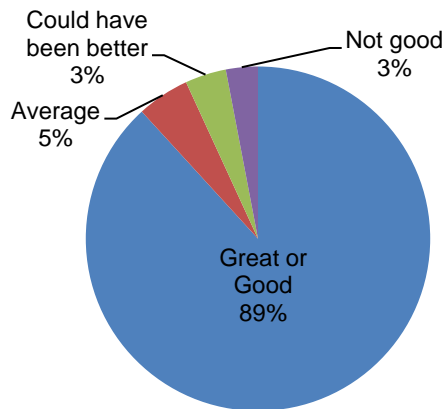


2023 Follow-up and Quality Assurance Survey

To meet Inform USA requirements, we conduct several types of surveys on our calls. Every caller who has not provided a customer satisfaction survey in the last 30 days is invited to participate in an automated after-call quality assurance survey when they select the option to do so. It is also our protocol to reach out to 5% of the callers who were provided referrals 7-14 days after the initial call to inquire whether their needs were met or not by the referred agencies.

We used InContact Echo survey tool for the automated quality assurance survey. In 2023 there were 17,078 calls handled by Dane County I&R Specialists and 550 callers (3.2%) decided to provide immediate feedback. Callers had to rate our overall services with 5 being the highest (great) and 1 being the lowest (not good). Over 89% rated United Way 211 services great or good.

The majority of the callers are satisfied with our services

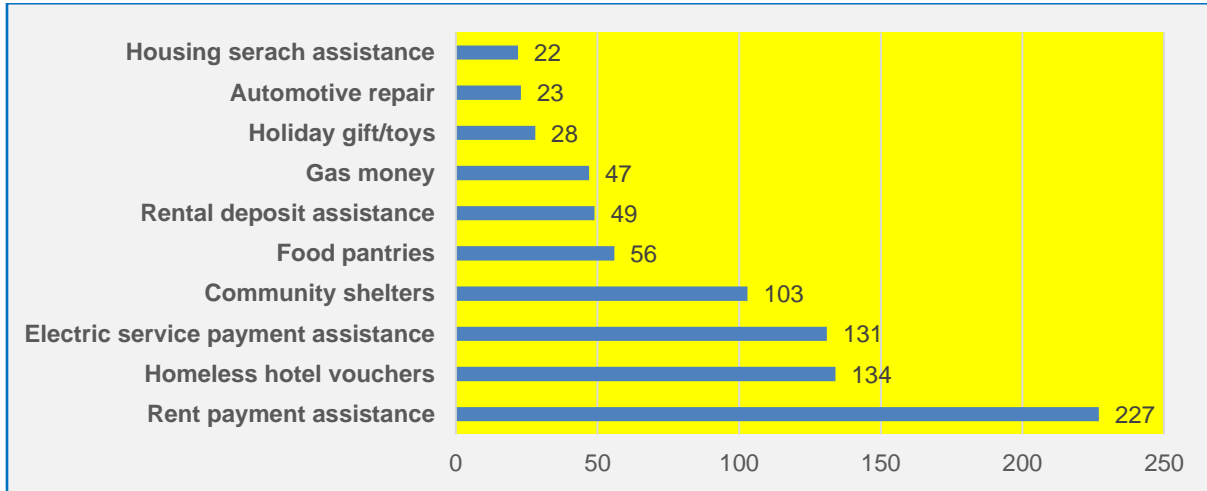


When callers gave us a lower rate, we investigated the recorded feedback as well as pulled the original call. Sometimes we learned that the only “complaint” about the service received was that the caller had already tried all their options to get help. Other times they mistakenly selected the wrong option. To better understand why some callers would not rate our overall services higher, it is important to ask additional questions and find out how we can improve.

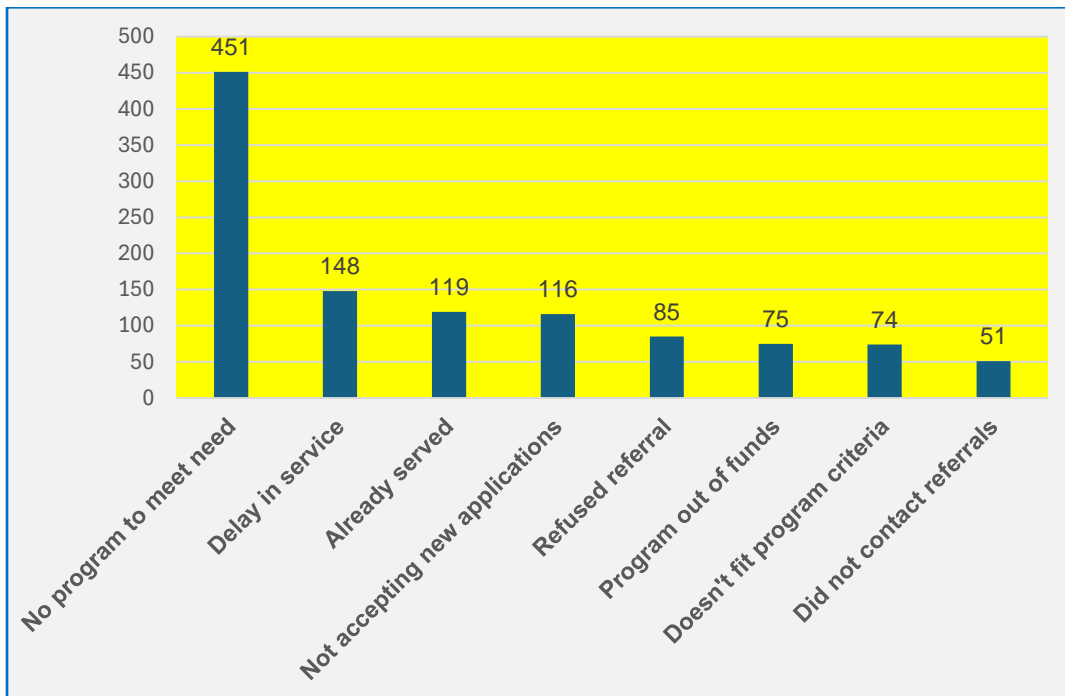
Callers can also rate the friendliness of the I&R Specialist. In 2023 we learned that 97.65% of those participating in the survey thought the Specialists were friendly and professional. Additionally, 99.40% would recommend 211 to family and friends and 95.30% believed that we were able to answer their questions or resolve their initial problems. These higher percentages prove that some of the feedback less satisfied with our services are not related to our professionalism, but the lack of services. We also use our call monitoring form when we do find out that we need to address the call handling process with an I&R Specialist.

There are two ways to collect unmet needs. We record this data at the time of the call when we are unable to provide referrals. The other way is when we provide referrals and ask permission from the callers for a follow-up survey to find out if the agencies were able to help. The charts below combine data recorded at the time of the original call as well as during follow-up.

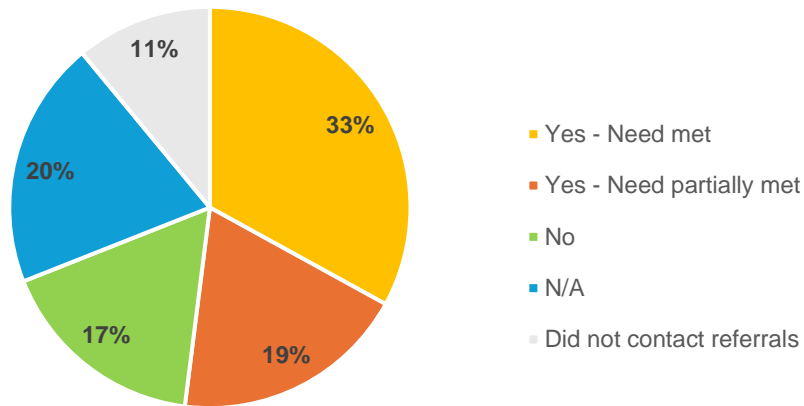
We saw the highest number of unmet needs related to housing which included rent and electric service payment, homeless hotel vouchers and community shelters.



We record "No program to meet need" when we are unable to find help for a specific need. All other reasons except "Client didn't follow through" can be also recorded during the initial contact.



In 2023 we received a total of 19,119 information and referral calls that were appropriate for a follow-up survey. The total number of scheduled basic needs follow-up calls was 475 and we were able to get data from 380 callers. We learned that the majority of those (65.5%) who followed through with the referrals were able to receive help.



Additionally, we are scheduling follow ups on calls received by the Addiction Recovery Helpline. In 2023 we performed 85 follow up calls and learned that 48 callers' (56%) needs were met or partially met. 14 callers (16%) reported unmet needs while 11 callers (12%) did not follow through the referrals. We were unable to reach 12 callers (14%). The primary reason for unmet need (23) was not receiving appointment for at least one referral.

To meet our standards, we continue to schedule follow-up calls in 2024. Our goal is to follow up on at least 5% of the appropriate (not misdirected) information and referral calls to better serve the needs and provide system advocacy for those who are not able to receive assistance from the referred agencies. To assure to document when a caller opts out from a follow up call, we modified the intake form adding "refused" or "not appropriate" to the question "May we follow up with you?".