Indiana 211 is a program of the Indiana Family and Social Services Administration

Policy Title	**Community Engagement Standard Operating Procedures**
Effective Date	6/5/2024
Approval	Kevin Evans, Deputy Director Shari Bowers-Dueker, Community Engagement Coordinator
Applicable To	Community Engagement Team

PURPOSE AND SCOPE

The Indiana 211 Community Engagement Team will practice regular routines to ensure they are meeting their individual and team goals related to spreading public awareness about Indiana 211 and seeking new resources in identified target communities.

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DAILY PRACTICES

Facebook Search

Utilizing a professional Facebook account can be a good way to find out about new agencies or programs. It is recommended that both Community Engagement Coordinators follow the Facebook pages of major agencies already in the Indiana 211 database as they often share posts and information for other organizations in their areas.

Both Community Engagement Coordinators should determine a regular time each day to check the feed of their professional Facebook accounts for new posts. Look for (1) updates posted about agencies already listed in the Indiana 211 database, (2) information about new agencies not already listed in the database, and (3) potential tabling events. Depending on the number of agencies you follow and the number of new posts in your feed, this search could take 5-30 minutes of your day.

For any new information found, follow the procedures in the **New Resources** section below.

For any potential tabling events, refer to the Public Awareness Target Community Tracking Sheet to determine whether they are located in a community with low public awareness.

Monitor FSSA IN211 Info Outlook Inbox

The two community engagement coordinators should alternate weeks for monitoring the Community Engagement folder of the FSSA IN211 Info Outlook Inbox.

On their assigned week, the Community Engagement Coordinator should look for unread messages in the designated folder throughout each day and handle them appropriately.

Monitor Resource Leads Tool

At the beginning of each day, one Community Engagement Coordinator should check the Resource Tracker Microsoft List for any new resource leads that were added by another team member the previous day.

As of June 2024, the assigned Community Engagement Coordinator is Shari Bowers-Dueker.

Disregard any entries that contain information for agencies already listed in the database; those are to be handled by the Resource Curation Team.

For any entries regarding a new resource not already listed in the database, follow the procedures in the **New Resources** section below.

WEEKLY PRACTICES

Provide Direction to Community Engagement Curators

The Community Engagement Coordinators are responsible for providing direction to the one full-time and two part-time Community Engagement Curators on tasks related to seasonal and special projects as well as new resource leads.

Every Friday, one Community Engagement Coordinator should send an email summary to the entire Community Engagement Team of assigned curation work for the following week.

As of June 2024, the assigned Community Engagement Coordinator is Shari Bowers-Dueker.

Resource Search

Both Community Engagement Coordinators should choose two days each week to dedicate 30-60 minutes to actively searching for new resources that meet identified unmet needs.

With each search, choose a type of need and a target community identified by the most recent data report, as displayed in the New Resource Target Community Tracking Sheet.

The following procedures are recommended for a more effective google search.

1. Go to google.com (even if using Google Chrome).
2. In the bottom left corner, click "settings" and then "advanced search."
3. Complete any fields that may elevate your search. This page is helpful for a more specific google search because it provides you with notes on which type of search words should include quotes or connecting words and allows you to search specific domains.
    - For example, when looking for food pantries in Wayne County, the advanced search may look like this:
      all these words: *Indiana*
      this exact word or phrase: *"Wayne County", "Food Pantry"*
      site or domain: *.org*

For any new resources found, follow the procedures in the **New Resources** section below.

Social Media Posts

One Community Engagement Coordinator should choose at least one day each week to create and post information to Indiana 211's Facebook page. Facebook posts should contain information about a new resource in the Indiana 211 database, seasonal resources now available, or other information that may be important to share with the general public. Posts can be duplicated or altered to be posted on Indiana 211's Instagram or X account, as the Community Engagement Coordinator sees fit. Track all social medica posts on the IN211 Social Media Posts Tracker.

As of June 2024, the assigned Community Engagement Coordinator is Jill Shamon.

MONTHLY PRACTICES

Data Reports

One Community Engagement Coordinator should choose one day each month to pull new data to update community engagement target communities as needed.

As of June 2024, the assigned Community Engagement Coordinator is Shari Bowers-Dueker.

Follow the procedures in the Target Community Guide when pulling data and report all findings in the New Resource Target Community Tracking Sheet and the Public Awareness Target Community Tracking Sheet.

Indiana 211 Internal Newsletter

The Community Engagement Team will meet once monthly to discuss who will prepare content for the Seasonal Updates and Community Connections sections of the upcoming month's Indian 211 Internal Newsletter. Content ideas and assignments should be entered into the Newsletter Content Tracker, and the content to be posted should be entered into the appropriate template of the 2024 Newsletter Template Folder. Newsletter content is due on the 15th of the month prior.

One Community Engagement Coordinator is responsible for also (1) completing the Staff Birthdays and Work Anniversaries section and for (2) reaching out to the person chosen for the Navigator Story or Highlight 21 days before content is due and obtaining their article for the newsletter by the content due date.

As of June 2024, the assigned Community Engagement Coordinator is Jill Shamon.

Tabling Event Search

Both Community Engagement Coordinators should choose two days each month to dedicate 30-60 minutes to actively searching for tabling events to attend.

With each search, use the Public Awareness Target Community Tracking Sheet to choose a county with low public awareness that the Community Engagement Team has not yet visited this year. Refer to the Outreach Events Microsoft List to determine whether a county has already been visited.

In addition to conducting a google search, Eventbrite is a useful website for finding potential tabling opportunities. If you create an account, you can set up automatic notifications for events that meet specified criteria.

When a potential tabling opportunity is identified, reach out to the appropriate contact, or complete the applicable registration form to request participation.

When an upcoming tabling opportunity is scheduled, it should be entered into the "Upcoming Events" bucket of the CE and RC Project Management Planner as well as on the shared Speaking/Events Calendar in Outlook.

Indiana 211 Champion Check-in

An Indiana 211 Champion is any individual who works for a nonprofit or government agency related to health or human services and who has agreed to collaborate with Indiana 211 on a voluntary basis to provide additional insight about resources in their community based on information they already know or can easily obtain from their current position. An Indiana 211 Champion should also be willing to share Indiana 211 materials and talk about what we have to offer when attending events related to their current position.

An Indiana 211 Champion may include, but is not limited to, an employee of a local Community Action Program (CAP) agency, an employee of a local United Way agency, or a Coordinator of a local Systems of Care (SOC) group.

As Indiana 211 Champions are identified, they should be entered into the Indiana 211 Champions Microsoft List and split amongst the two Community Engagement Coordinators to keep in touch with.

Both Community Engagement Coordinators should check-in with their assigned Indiana 211 Champions monthly. The check-in will primarily take place via email but could also include a phone call or even an in-person visit if the Coordinator is going to be in their area. The following topics are good discussion points for these check-ins; they do not all have to be covered with each check-in.

- Any new agencies or programs in the Champion's community
- Any upcoming events Indiana 211 may want to attend or any local agencies that may benefit from having Indiana 211 present to them
- Any upcoming events the Champion is attending that they could bring Indiana 211 materials to
    - Coordinate getting materials to Champions as needed
- Identify a significant unmet need in the Champion's community, provide a list of resources we already have listed in the database for that need, and ask if the Champion is aware of any resources we are missing

Indiana 211 University

The Community Engagement Team will host a monthly webinar, to which all agencies listed in the database are invited, as well as other identified agencies that support service providers.

With each webinar, the following should be covered:

- Choose a new topic to cover each month.
    - The Community Engagement Team will introduce the topic and briefly talk about the types of resources available in the Indiana 211 database related to the topic.
    - Invite a guest speaker to present on the topic in more detail.
- Remind service providers how they can update their agency's information in the Indiana 211 database.
- Remind service providers how they can request a speaker or marketing materials.

- Highlight any current seasonal or special projects and ask that service providers let you know about any programs being offered you may not already have listed.
- Let attendees know when the next webinar will be.

When planning future webinars, track all topics, speakers, and key points in the Indiana 211 University Microsoft List. Attendance information should also be entered after each webinar.

As of June 2024, Indiana 211 University will launch in July and will be held on the third Wednesday of every month, 10am-11am.

PERIODIC PRACTICES

Attending Events

When an upcoming event is scheduled, it should be entered into the "Upcoming Events" bucket of the CE and RC Project Management Planner as well as on the shared Speaking/Events Calendar in Outlook.

Community Meetings (Organization-Facing)

The Community Engagement Coordinators will attend various virtual and in-person community meetings each year and should focus on meetings in communities identified on the New Resource Target Community Tracking Sheet as well as the Public Awareness Target Community Tracking Sheet.

Community Meetings may include, but are not limited to, local Systems of Care meetings, Social Concerns Groups, or Domestic Violence Coalitions. The Community Meetings Spreadsheet should stay up-to-date with regularly attended meetings for each Community Engagement Coordinator.

After attending a community meeting, log activity from the meeting in the Outreach Events Microsoft List. Be prepared to (1) rate individuals' understanding of 211 from the meeting, (2) provide the approximate number of materials distributed, and (3) provide the approximate number of people engaged with.

Be sure to take notes during community meetings, noting all other agencies in attendance and any special programs they may talk about. Also be sure to collect any business cards or other materials available from other organizations. These notes and business cards should later be used to conduct an inclusion assessment and follow the procedures in the **New Resources** section below.

Community Events (Public-Facing)

The primary purpose of attending public-facing community events is to spread public awareness in communities where awareness is low, as identified on the Public Awareness

Target Community Tracking Sheet. However, at some events, the opportunity will arise to gather information about other organizations as well.

After attending a community event, log activity from the event in the Outreach Events Microsoft List. Be prepared to (1) rate individuals' understanding of 211 from the event, (2) provide the approximate number of materials distributed, and (3) provide the approximate number of people engaged with.

When hosting a vendor table at a community event, if the opportunity arises, make note of the other agencies hosting vendor tables and engage with representatives from other organizations as time allows. Any notes taken or business cards collected should later be used to conduct an inclusion assessment and follow the procedures in the **New Resources** section below.

Marketing Material Requests

As requests for marketing materials are received in the FSSA IN211 Info Outlook inbox, they should be entered into the "Marketing Materials" bucket of the CE and RC Project Management Planner.

When fulfilling a request for marketing materials, you will need to know the type and quantity of materials needed and whether the requesting agency is close enough to the Indiana Government Center to pick the materials up. If they are not, ask for the best mailing address.

When mailing marketing materials:

1. Choose the most appropriate envelope size for the requested materials.
2. Use rubber bands around small stacks of materials to prevent damage in the envelope.
3. Put a pre-printed return address label on the envelope, with packing tape over it to make sure it is secure.
4. Use a Sharpie to address the envelope with the provided mailing address.
5. Use a binder clip to attach a blue mail card to the outside of package.
6. Leave the package in the Outgoing Mailbox in the FSSA Admin office.

Resource Guides

The Community Engagement Team may receive lists of resources from various organizations they collaborate with. These lists should be added to the "Resource Guides" bucket of the CE and RC Project Management Planner.

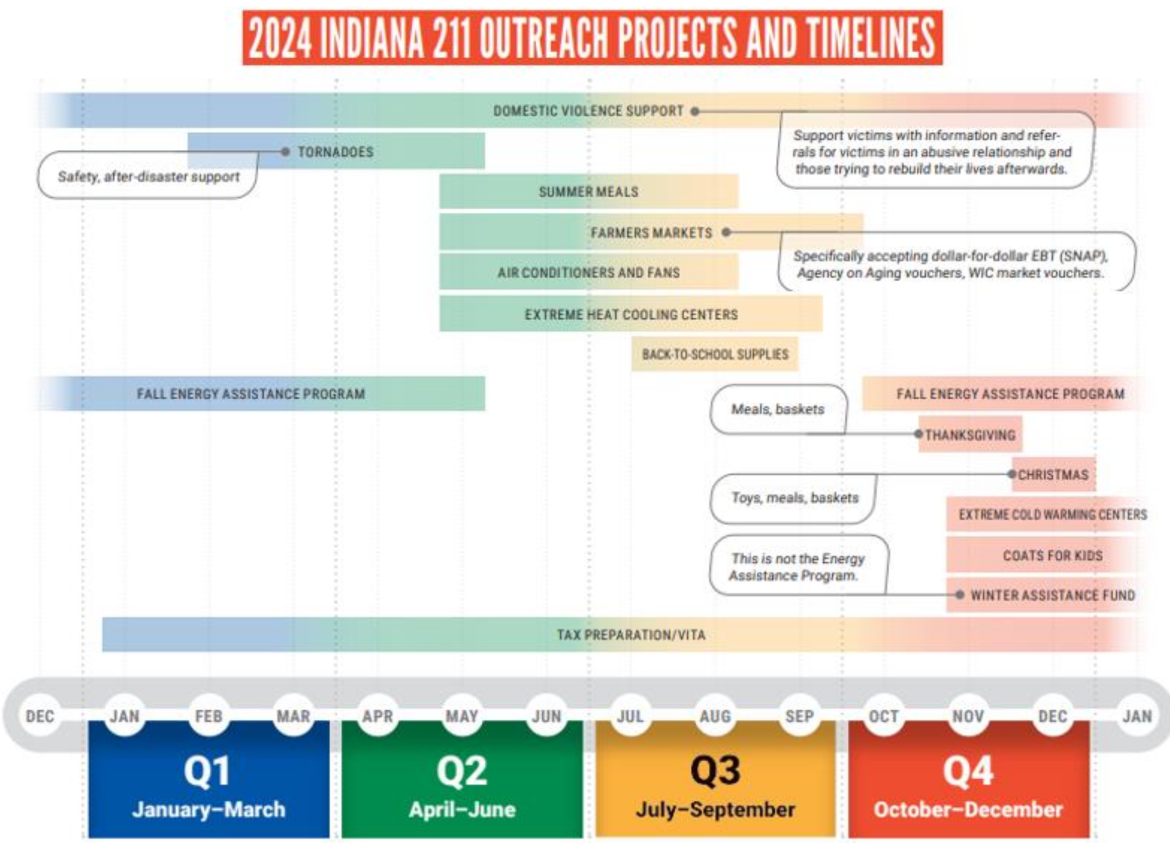
Reviewing a Resource Guide for potential new resources should be assigned to either a Community Engagement Coordinator or a Community Engagement Curator, depending on who has the capacity.

For any new resources found, follow the procedures in the **New Resources** section below.

SEASONAL PRACTICES

Timeline

Both Community Engagement Coordinators are responsible for managing seasonal projects and should use the following timeline as a guide when determining when to begin each seasonal project.



Pull VisionLink List of Resources

For each Seasonal Project, one Community Engagement Coordinator should pull the list of agencies from VisionLink that need to be contacted.

As of June 2024, Jill Shamon is responsible for the following seasonal projects:

- Air Conditioners and Fans
- Extreme Heat Cooling Centers
- Back-to-School Supplies
- Coats for Kids/Winter Clothing
- Winter Assistance Fund (Agency 5225)

- Christmas Meals, Baskets, and Toys

As of June 2024, Shari Bowers-Dueker is responsible for the following seasonal projects:

- Farmers Markets and SNAP Dollar Matching
- Summer Meals
- Fall Energy Assistance Program
- Thanksgiving Meals and Baskets
- Extreme Cold Warming Centers
- Tax Preparation/VITA

Follow these procedures when pulling a list of seasonal resources from VisionLink and creating a tracking spreadsheet.

1. Search for the relevant services in VisionLink by using the applicable taxonomies.
2. Export the search results using the FSSA Service Export Form.
3. When the spreadsheet is received, keep the Agency ID, Service ID, and Service Name columns and delete the rest.
4. Clean up the spreadsheet to only contain the services that were offered the previous year.
    a. Keep all service with the previous year in the service name
    b. Delete all services with a year prior to the previous year in the service name.
    c. Investigate any service with no year in the service to determine whether it was offered last year.
5. Once the spreadsheet is cleaned up, add three more columns: Assigned Curator, Offering this Year?, and Notes
6. Assign each service to one of the three Community Engagement Curators, ensuring there is an fair distribution of services based on the number of days each curator can dedicate to the project between the start date and the due date.
7. Upload the completed tracking sheet to the Seasonal Projects folder of the FSSA IN211 Database Team SharePoint Site.
8. Send an email informing the team of the seasonal assignment.
    a. Send to the three Community Engagement Curators
    b. CC the Deputy Director of Community Engagement, Data, and Resource Curation, the Resource Curation Quality and Training Supervisor, and the other Community Engagement Coordinator
    c. Include the following components in the email
        i. A link to the applicable tracking spreadsheet
        ii. A link to the applicable Resource Template if one exists
        iii. What the standard service name should be for this project (i.e. Cooling Center 2024, School Supplies 2024, etc.)

iv. Any other instructions specific to this project (i.e. what information should be updated in the standard application/intake process for EAP services)
v. Due date for the project

Seek New Resources

With each seasonal project, both Community Engagement Coordinators should choose two days each week to spend 30-60 minutes actively searching for new resources for the relevant season. The Coordinators should agree on a reasonable time frame for which they continue this process (i.e. Nov 1 – Dec 23 for Christmas resources).

When searching for new resources, follow the suggestions in the **Weekly Practices → Resource Search** section above.

For any new resources found, follow the procedures in the **New Resources** section below.

Note: When a disaster occurs related to a seasonal resource, such as dangerously high or low temperatures, new resources should be sought out daily during the disaster period. The Community Engagement Coordinators should also use the **Disaster Procedures – Data** section below to pull client data every day for the duration of the disaster to identify unmet needs.

DISASTERS

Disaster Levels

The below chart is used across all Indiana 211 teams to define the various levels of disasters that might occur and the actions Indiana 211 will take to respond to such disasters.

	Disaster Type	Effects	Response	211 Action
Level 1	➢ Heavy snow events ➢ Thunderstorm & lightening ➢ Torrential rains ➢ Minor utility outages expected to last less than 48 hours ➢ Extreme heat or cold ➢ Drought ➢ Significant weather events predicted ➢ Apartment fire or evacuation ➢ Technological disaster ➢ Terrorist threats ➢ Mass shooting	• Minimal impact • Slight increase in calls • Specific populations (elderly, disabled) may be effected	✓ No presence required at Local or State EOC ✓ Few (if any) disaster resources become available ✓ Normal staffing levels are adequate	→ Review emergency plans → Notify staff currently on duty → Locate available resources → Contact local utility providers → Contact local Red Cross → Contact 311 → Distribute any travel advisory, weather advisory information/maps
Level 2	➢ Winter storm ➢ Blizzard ➢ Ice storm ➢ Isolated flooding ➢ Significant wind event ➢ Sudden removal of critical resource from community (contamination or water, etc.) ➢ Utility outages expected to last longer than 48 hours ➢ Health epidemics ➢ Large scale community event (mass shooting, riot) ➢ Hazardous material incidents ➢ Industrial accidents	• Noticeable and consistent increase in call volume • Community resilience taxed • Outside resources may be needed • General population may be effected • Effects are anticipated to be short-term and possibly isolated to specific areas of region	✓ Additional staff may be needed for short duration ✓ Extended shifts as necessary ✓ Presence requested at local EOC only ✓ Increase in disaster/emergency resources	→ IN211 designees monitoring → All staff alerted → Assistance of Resource Team may be requested → Locate available resources → Contact local utility providers → Contact local Red Cross → Contact 311 → Distribute any travel advisory, weather advisory information/maps → Update all disaster resources every 30 minutes → Community Navigators take home laptops

	Disaster Type	Effects	Response	211 Action
Level 3	➢ Mass flooding ➢ Tornadoes ➢ Earthquake (6.9 or smaller) ➢ Pandemics ➢ Localized terrorism attack ➢ Biological/chemical attacks	• Sudden and alarming increase in call volume • Major influx of unorganized/unverifiable disaster resources • Community resilience depleted and overwhelmed • Federal and state resources required • Majority of localized population effected • Effects are anticipated to be long-term and	✓ Extended shifts required ✓ Volunteers activated ✓ Presence required at local & state EOC's ✓ Community resources increased in response to immediate needs	→ Supervisor on duty at all times → All staff alerted of upgrade → Staffing requests made → Assistance of Resource TEAM required → Volunteers activated → Locate available resources → Contact local utility providers → Contact local Red Cross → Contact 311 → Update all disaster resources and information on an ongoing basis
Level 4	➢ Global or national disaster ➢ Tsunami ➢ Tornado Outbreak ➢ Earthquake (7.0 or larger) ➢ Wide-spread terrorism attack ➢ Large-scale Biological/ chemical attacks	• Overwhelming call volume • Communication difficulties • Military and federal resources required • Majority of population effected • Effects are anticipated to be long-term and wide-spread	✓ Extended shifts required ✓ Staff may be deployed ✓ Volunteers recruited ✓ Presence required at local & state EOC's ✓ State and federal resources increased in response to immediate needs	→ Supervisor on duty at all times → All staff mandate → Volunteers activated → Distribute any travel advisory, weather advisory information/maps → Update all disaster resources and information on an ongoing basis

Disaster Procedures - Resources

The two Community Engagement Coordinators are on call at all times in case a disaster was to occur that greatly impacts one or more communities in Indiana. If the disaster occurs during regular work hours and the Community Engagement Curators are available to assist, then the two Coordinators should provide them with directions for assisting.

The Community Engagement Team should employ the following procedures when Indiana 211 needs to respond to a disaster.

1. One team member should create a database record where all resources related to the given disaster will be listed. When creating the record, follow the guidelines in the Disaster section of the Resource Curation Team Standard Operating Procedures. Notify the Curation Quality and Training Supervisor after the record is created.
2. All available team members should search for resources that assist with the given disaster and contact agencies for additional information as needed. Refer to the **Disaster Levels** chart above for guidance on the types of resources to look for and the types of agencies to contact. The data reports described below will also be helpful for determining which resources to search for.
3. Any new resource found should be added to the Resource Tracker Microsoft List. Be sure to mark the "Rank" column as "Critical."
4. The Curation Quality and Training Supervisor will then assign a Database Curator to add the resource to the database.

Disaster Procedures - Data

One Community Engagement Coordinator should use the following procedures to monitor call data when a disaster strikes and should continue the procedures daily for as long as a community is impacted by the disaster.

1. Do a Client Export from VisionLink.
    a. Under the Contact Center section, select Create Dates between the start of the disaster, or the last day that monitored if data has already been pulled, and the current day. Depending on when the client exports are being pulled, it may be more beneficial to select "Within the past number of days" or "Within the past number of hours."
    b. Under the Service Type section, select "Disaster" as the service type.
2. Capture important information from the exported excel spreadsheet.
    a. On the Interaction_referral tab, keep the following columns and delete the rest:
        i. InteractionReferral_ReferralsModule_client_id
        ii. InteractionReferralTaxonomy_Taxonomy_name
        iii. InteractionReferral_ReferralsModule_interaction_id

    iv. InteractionReferralService_Service_name
    v. InteractionReferralTaxonomy_Taxonomy_reason_unmet
    vi. InteractionReferralTaxonomy_Taxonomy_external_reference_name
  b. On the Interaction_referral tab, sort the InteractionReferralTaxonomy_Taxonomy_reason_unmet column by alphabetical order.
  c. On the Interaction_referral tab, copy only the rows that have "No Referral Given: Service Unavailable" in the InteractionReferralTaxonomy_Taxonomy_reason_unmet column.
  d. Paste the copied rows into a new tab.
  e. On the new tab, sort the InteractionReferral_ReferralsModule_client_id column by lowest to highest.
  f. On the new tab, identify any duplicated numbers in the InteractionReferral_ReferralsModule_client_id column. If any of the duplicates have the same taxonomy listed under the InteractionReferralTaxonomy_Taxonomy_external_reference_name column, then keep only one row. If any duplicates have different taxonomies, then keep one row for each individual taxonomy.
  g. On the new tab, sort the InteractionReferralTaxonomy_Taxonomy_name column by alphabetical order.
  h. On the Client tab, look at the ClientAddressus_ClientAddressus_county column to identify whether there were clients from multiple counties associated with the disaster referrals.
    i. If there is only one county, then continue to step 3.
    ii. If there are multiple counties, then add a "County" column on the new tab, take each client ID from the new tab, search for it on the Client tab, look at the County listed for that client, and enter it in the County column on the new tab.
3. Use the information captured on the new tab to report data on the [Unmet Needs Tracking Spreadsheet].
  a. On the Unmet Needs Tracking Spreadsheet, create a new tab for each new disaster, with the tab name being the date or range of dates that disaster data reporting will take place. Use a previous tab to create a table with the appropriate column labels.
  b. On the Unmet Needs Tracking Spreadsheet, create a row for each taxonomy that appeared on the new tab.
  c. On the Unmet Needs Tracking Spreadsheet, enter the county associated with each taxonomy. If any one county has multiple counties associated with it, create a new row for each additional county.
  d. On the Unmet Needs Tracking Spreadsheet, enter the count of unmet needs for each row.

    e. On the Unmet Needs Tracking Spreadsheet, enter all Client IDs associated with each row.
4. The Unmet Needs Tracking Spreadsheet is now ready to be used for identifying solutions to the unmet needs.
    a. In the "Notes" column of the Unmet Needs Tracking Spreadsheet, document all efforts made in trying to identify solutions.
    b. Any new resource found should be added to the Resource Tracker Microsoft List. Be sure to mark the "Rank" column as "Critical."
    c. When a new service gets added to the database, add it to the "Service(s) Found to Fill Unmet Need" column of the Unmet Needs Tracking Spreadsheet.
5. Create a Microsoft List for tracking disaster efforts to share with the Community Navigator team.
    a. Use the Monroe, Vigo, Clay, Owen County Disaster Microsoft List as an example.
    b. Add the Unmet Needs Tracking Spreadsheet as an item on the list.
    c. Add any other important findings such as information discovered from contacting EMA agencies or important findings from client interactions related to the disaster.

NEW RESOURCES

Inclusion Assessment

After a Community Engagement Coordinator has discovered a potentially new agency to include in the Indiana 211 database, the following procedures should be conducted to determine whether the agency is appropriate for inclusion.

1. Ensure the agency is not already included in the database. Since the information we receive about an agency is not always the same as the information we have in the database, each of the following separate searches is recommended before concluding that an agency is not already listed in the database.
    a. **Agency Name**: *Search by the name you were made aware of*
    b. **Feature Keyword**: *Search by the name you were made aware of and any acronyms or AKA names the agency may have*
    c. **Street/Physical Address**: *Enter the street number and city of each of the agency's locations*
    d. **Main Phone**: *Enter the agency's main phone number and any additional, local phone numbers they may have*

    If the agency already exists in the database, but the program or location you discovered does not already exist, add it to the Resource Tracker Microsoft List, mark the "Department" as "Resource Curators" and be sure to include the Agency

ID and any other important information. Leave this entry unassigned under "Assigned to" as it is now the responsibility of the Resource Curation Quality and Training Supervisor to assign the lead to a Database Curator.

2. Ensure that the new agency or new program for an existing agency meets the Indiana 211 Inclusion Policy.
3. If a new agency or new program meets inclusion, add it to the Resource Tracker Microsoft List, mark the "Department" as "Community Engagement" and assign yourself "Assigned to" until an inclusion request form is received.
4. Once you have contacted an agency and received an Inclusion Request Form, reassign the lead to a Community Engagement Curator to add to the database.

Agency Contact

After a Community Engagement Coordinator has discovered a new agency that meets the Inclusion Policy, they are responsible for contacting the agency to obtain an Inclusion Request Form with all of the information needed to add the agency to the database. A Community Engagement Curator may be asked to assist with this process as needed.

The initial contact with an agency can either be done by email or by phone. Starting with an email is most appropriate when a direct email address is already known (typically obtained through a community meeting or through a mutual contact), while starting with a phone call is most appropriate when no direct contact information is known.

Whether starting with an email or phone call, the goals should be to introduce, (or reintroduce) yourself and Indiana 211, find out whether the agency is interested in being listed in the database, and provide the Inclusion Request Form. Suggested call and email scripts are included below and should be altered as needed to meet the situational needs.

Call Script

Initial Greeting with Receptionist

"Hi, my name is (*your name*), and I am calling from Indiana 211, the state of Indiana's information and referral service. We recently realized we do not already have (agency name) listed as a resource in our database, but we think it would be a valuable referral for some of our callers in the area. Is there someone I could speak to about including it in the database?"

> *(Ideally, this will lead to you being transferred to someone you can either speak to or leave a voicemail with. If the receptionist says no one is available at the moment, ask if they are able to provide you with an email or send you to the voicemail of the person you need to speak to.)*

Conversation with Main Contact

"Hi, my name is (*your name*), and I am calling from Indiana 211. Are you familiar with 211?"

IF NO – “Indiana 211 is a free and confidential service that connects Hoosiers with health and human service resources throughout Indiana that can meet their needs. We maintain a database of various agencies throughout the state and the services they offer that may be able to meet the needs of our callers. In addition to including (*name the type of services offered by this agency*), we also have homeless shelters, food and clothing pantries, rent and utility assistance programs, domestic violence resources, substance use disorder treatment, and much more; those are just a few examples.

IF YES – “Great!” (*and move on*)

“We recently realized we do not already have (agency name) listed as a resource in our database, but we think it would be a valuable referral for some of our callers. Would you be interested in having (*agency name*) listed in the Indiana 211 database so we may refer clients who could benefit from your services?”

IF NO – “Okay, well we do feel that many of our callers would benefit from us being able to refer them to you for (*name the type of services offered by this agency*), so may I ask why you are not interested in being listed?

IF YES – “Great! The best way to get all of the information we need is to have you fill out our Inclusion Request Form. Would it be okay if I email this form to you?”

(obtain contact name and email address and then follow the email script when sending the form)

Email Scripts

Starting with Email Rather Than Calling:

Subject: Indiana 211 - Inclusion of (*Agency Name*)

Hello (*contact name*),

I am reaching out from Indiana 211, a free and confidential service that connects Hoosiers with health and human service resources throughout Indiana that can meet their needs. I recently came across (*agency name*) and realized we do not already have it listed as a resource in the Indiana 211 database, but I believe it would be a valuable referral for some of our callers.

(*the first paragraph should be altered if you have already directly met the contact*)

If you are interested in having (*agency name*) listed in the Indiana 211 database, the next step is to complete the Inclusion Request Form so we have all of the information we need to create the database record. You can either use the embedded link or go to in211.org and click "Community Agencies" and then "Inclusion Request Form."

Please let me know if you have any questions and whether you are interested in having (*agency name*) listed in the Indiana 211 database.

Thank You!

Sending Inclusion Form After Receiving Email Address Over the Phone:

Subject: Indiana 211 - (*Agency Name*) - Inclusion Form

Hello (*contact name*),

It was great speaking to you today! As I mentioned on the phone, the best way to get all of the information we need to add (*agency name*) to the Indiana 211 database is to have you complete the Inclusion Request Form. You can either use the embedded link or go to in211.org and click "Community Agencies" and then "Inclusion Request Form."

We look forward to adding (*agency name*) as an additional resource in the Indiana 211 database, and we appreciate all of the valuable work you do to serve our community!

Please let me know if you have any questions as you are completing the form.

Thank You!

Addition to Database

Community Engagement Curators are responsible for adding new resources to the Indiana 211 database after a Community Engagement Coordinator has obtained an Inclusion Request Form.

1. When entering a new resource in the database, Community Engagement Curators should follow the "Entering New Resources" section of the Resource Curation Team Standard Operating Procedures. Do not yet make the record active or assign a resource curator.
2. If any necessary information is missing from the Inclusion Request Form, the Community Engagement Curator assigned to the new resource lead is responsible for following up with the contact who submitted the form to get all of the information needed.
3. When the record is complete, do the following.

a. add a comment in the applicable entry of the Resource Tracker Microsoft List, being sure to tag the Community Engagement Coordinator who assigned the lead to you in the comment to ensure they get notified.

b. Then send the agency ID to a second designated Community Engagement Curator to spot check the record for adhesion to the Resource Curation Team's Style Guide and User Guide and to assign a Database Curator using the Resource Update Schedule Dashboard.

    i. As of June 2024, the designated Community Engagement Curator is Jerry Parsons.

    ii. The Database Curator with the smallest number of resources in the same complexity level as the new record should be assigned to the record.

    iii. After spot checking, the new record can be made active.

4. After the new record has been created, spot checked, and made active, the designated Community Engagement Curator should send an email verification request to the contact who submitted the Inclusion Request Form, add them as the agency/service/site update contact, and send a follow up email to let them know that (1) the record is complete, (2) we are responsible for updating the record annually but they can always submit an update on our website, and (3) they will receive a separate email from CommunityOS to verify their email address. Here is an example of a follow up email:

    Hello (*contact name*),

    Thank you for submitting an Indiana 211 Inclusion Request Form. (**Agency name**) has now been added to the database. We are responsible for updating each agency in our database annually. You will receive a separate email from CommunityOS, the system we use, asking you to verify your email address so you may receive an automated annual email reminder to review your agency's record and suggest updates as needed.

    If any information changes and needs to be updated before your next annual update is due, you can always visit in211.org to search for your agency's record and submit a Resource Provider Update Request Form.

    If you have any additional questions or need assistance at any point, you can always contact our Resource Curation Team by email at in211database@fssa.in.gov or by phone at 888-211-2402.

    We are excited to have (*agency name*) included in the Indiana 211 database, and we appreciate all of the valuable work you do for the community!

REFERENCE

CE and RC Project Management Planner

Community Meetings Spreadsheet

Deactivating Resources Microsoft List

Eventbrite

FSSA IN211 Database Team SharePoint - Seasonal Projects Folder

Indiana 211 Champions Microsoft List

Indiana 211 Inclusion Policy

Indiana 211 Inclusion Request Form

Indiana 211 Interaction Dashboard

Indiana 211 University Microsoft List

Monroe, Vigo, Clay, Owen County Disaster Microsoft List

New Resource Target Community Tracking Sheet

Newsletter Content Tracker

Outreach Events Microsoft List

Resource Curation Team Standard Operating Procedures

Resource Tracker Microsoft List

Resource Provider Update Request Form

Resource Update Schedule Dashboard

Target Community Guide

2024 Unmet Needs Tracking.xlsx

Style Guide and User Guide

2024 Newsletter Template Folder

CORRECTIONS & ADDENDUMS

Requests for corrections and any questions should be directed to Shari Bowers-Dueker, shari.bowers-dueker@fssa.in.gov.