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ABSTRACT

Follow-up seeks to renew contact with a person who has been informed about and/or referred to a service to determine if he has been linked successfully to the service he needs. Thus, follow-up is designed to: get services for people who did not get them the first time; make agencies more accountable for their service, secure planning information which sometimes leads to: advocacy, research studies or new services. Although follow-up can be a time consuming process, it is important because it fulfills the dual purpose of determining whether linkages between people and services have been made and also of monitoring the center's work. After the reasons for linkage failures that are related to the person himself, such as fearfulness, disinterest, physical incapacity, etc. have been followed through, the question becomes what to do about linkage failures resulting from: non-existent services, agency malperformance or non-performance, or restrictive or punitive public policy. This leads to the question of advocacy and its place in the center's program. (Other manuals in this series are available as LI 003187-003191 and LI 003193 through LI 003195). (Author/NH)

Information and Referral Services:

FOLLOW UP

(Working Draft)

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Nicholas Long, Ph.D.
Project Director
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Chapter 1: The What and Why of Follow-Up

What is Follow-Up?

Follow-up seeks to renew contact with a person who has been informed about and/or referred to a service to determine if he has been linked successfully to the service he needs. Implicit in follow-up is the desire to know how the person is doing, if the agency did or could provide the requested service, and if the center has fulfilled its mission. Follow-up also provides an opportunity for you to help the person again if your first effort failed, or if new needs arise.

Why Do Follow-Up

As you already know, linkage of people to services may not succeed for several reasons. Information in the resource file may be inaccurate. A person may change his mind about his need for an agency's services. He may have had his problem resolved in other ways. He may have had an accident that prevented him from acting on the information you gave him or the referral that you made for him. Perhaps he felt uncomfortable about actually going to an agency for help, and decided he did not want to go. The services to which you referred him may have been inappropriate to his problem or possibly he was unable to state his problem in such a way that the agency could effectively respond to it. An agency's policy may be too restrictive; or its personnel may be inadequately trained or uncaring in regard to people's needs; or its practice too limited and rigid. Any one of these reasons could prevent the person from being linked to services he needs. Thus, follow-up is necessary, not only to learn if the person has been linked to the service he needs, but if not, why. Unless you learn why the person did not obtain help, you cannot know what further action you should take in any given case.

Action that may be needed as a result of follow-up may include any of the following:

- correcting the resource file or bringing it up-to-date
- dropping the person's case
- giving the person new or different information
- referring the person to a different agency
- calling the agency to which the person was originally referred to discuss the agency's disposition or non-acceptance of the individual's case
- providing additional encouragement to the person to get help
- providing escort service for the person to the agency
- recording instances of non-existent services and unmet needs
- reporting unusual circumstances to AoA

Thus, follow-up is designed to:

- get services for people who did not get them the first time
- make agencies more accountable for their service
- secure planning information which sometimes leads to:
  - advocacy
  - research studies
  - new services

Chapter 2. Follow-Up Process or How You Do Follow-Up

Follow-up begins where information-giving and referral leave off. The process used in follow-up has already been suggested to you. You have already provided the person with information about the community provision best suited to his needs or have referred him to it. Now you want to know if he followed through on the information you gave him or the referral you made for him and, if so, if he was able to obtain the service or provision he needs.

Returned Referral Form

The returned, completed referral form that you sent to the service agency should tell you if the person got to the agency to which you referred him and if he was accepted for service. If the referral form is not returned to you within a given period of time, such as two weeks after the referral has been made, you should contact the person to find out what happened. The tagged personal record cards should tell you when individual referral cases should be followed up.

Follow-Up With Individuals

Follow-up should be done routinely with persons whom you have referred for services in order to learn directly from them if they are getting the services for which they were referred. This includes those individuals whom you directed to a specific agency without going through the formal referral process of completing a referral form.

Follow-up is especially imperative in those instances where a referral form has not been returned by the service agency.

Ideally, follow-up with individuals should be done by calling them on the phone. However, if the person is not reachable by phone or if you have tried to reach him by phone unsuccessfully for at least three times, mail him a follow-up form. (See Appendix.) This should be returned to the center in a stamped, addressed envelope to protect the person's privacy. Whether follow-up is done by phone or mail, what you want to know is:

- did the person get the services for which he was referred
- if not, why not
- and if not, would he like to consider other possibilities
- if yes, is he satisfied

After completing your contact with the individual, check the appropriate spaces on the personal record form regarding service found or not found as part of your ongoing record-keeping responsibility. Please refer to the section on record-keeping under Interviewing and Information-Giving. If in follow-up you learn that the person is not really interested in linkage, his decision should be respected and the matter then should be dropped. Otherwise follow through as earlier indicated and as listed under activities resulting from follow-up. Always remember to state who you are and your identification with the center when you call. Then proceed to state the reason for your calling.

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Follow-Up With Agencies

The agency's response on the returned referral form will indicate the degree to which you should pursue follow-up with an agency on any given case. If the response is clear and/or if the person is receiving or has received service from the agency, this is all the follow-up you need to do with the agency. If the response is not clear, however, or if the person is not receiving or has not received the service from the agency, call the agency's contact person to discuss the case with her or him, particularly if you have any question about the agency's decision. This will provide you an opportunity to work through misunderstandings about the case under consideration or to correct misinterpretations of an agency's function or policies. Also, if resource file information is inaccurate, this will give you an opportunity to correct it. As in follow-up with individuals, be sure to identify yourself and your affiliation with the center before you begin. Then state your reason for calling.

While follow-up may increase agency accountability and provide the center with a mechanism for monitoring its work, it must be done carefully, tactfully, and purposefully. Although agencies should be expected to conscientiously follow through on follow-up with a referring agency, there is a limit to the amount of time any one agency can be expected to spend on any given case, including follow-up activity on it with the center. One follow-up call per case should not cause any problem.

Chapter 3: Volunteers for Follow-Up

Ideally, the person providing the original service should do his own follow-up to maintain continuity of service with the person. This is preferable in all instances and quite possible with good work management. Depending on the volume of center activity, however, you may wish to consider the use of volunteers for follow-up. You are already aware of volunteer sources available to you. Keep in mind volunteers who have participated in other parts of the center's program, who also may wish to help in follow-up.

If volunteers are to be used in follow-up, they must receive training in using the resource file and in interviewing, just as any paid staff person. A less desirable alternative would be to develop a system whereby you or someone well-trained in using the resource file is used for back-up support with those individuals who indicate to the volunteer that they want further service. At this point the call could then be turned over to you. Using volunteers in follow-up is a good way to work them into the total service and to make sure that the center is adequately staffed at all times.

The number of volunteers needed for follow-up will depend on the volume of center business. Try to schedule regular hours for volunteers providing follow-up, such as one morning or afternoon a week. Use the knowledge you have already gained in working with volunteers in other parts of the service. The same principles hold:

- they should be given specific assignments
- they should be properly supervised
- they should know the background and purpose of the program in which they are working
- they should be publically and personally thanked for their service

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Chapter 4. Conclusion

Follow-up can be a time-consuming process. Yet it is an important component of the total I & R service. It fulfills the dual purpose of determining whether linkages between people and services have been made and also of monitoring the center's work. Once you have followed through on reasons for linkage failures that are related to the person himself, such as fearfulness, disinterest, physical incapacity, etc., the question then becomes what to do about linkage failures resulting from:

- non-existent services
- agency malperformance or non-performance
- restrictive or punitive public policy

This leads to the question of advocacy and its place in the center's program.

Appendix

Follow-Up Form

Date ______________________

Dear ____________________:

Recently you contacted the information and referral center for the elderly about (problem). You were referred to (agency) for help.

We would like to know if you did get or are getting the services for which you were referred. If you are not receiving or did not receive services from (agency), would you please indicate the reason in the space designated on the attached from, and also whether we can be of further help to you in obtaining services you may need or want.

Please complete the form, and return it to us in the enclosed, stamped envelope.

Thank you.

Sincerely,

____

Director, Information and Referral Center for the Elderly

Follow-Up Response

Did you receive or are you receiving the services for which you were referred?

Yes ____ No ____

If not, please indicate why ______________________________

Would you like us to be of further help to you? Yes ____ No ____

If yes, please contact me as soon as possible.

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Name ______________________

Address ______________________

Phone # ______________________