

**IL-NET**

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***Get to the Core of It:  
Information & Referral***

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## Why is I&R a Core Service?

- A primary means to promoting consumer empowerment
- Supports an individual's capacity for self-reliance and self determination
- "Education, affirmation, collaborative planning, and problem solving"—*AIRS*
- Provides a road map for navigating complex and confusing systems

# I&R Core Service: The Human Approach – The First Point of Entry



Consumers contact I&R Specialist for:

- Programs and services offered by their CIL
  - Independent Living Skills
  - Advocacy
  - Peer Support

## The First Point of Entry, cont'd.

Consumers contact I&R Specialist for:

- Resources offered within the community
  - Housing
  - Employment
  - Financial Assistance
  - Healthcare

# Customer Service

- For an I&R Specialist to succeed at providing relevant information, they must possess not only knowledge, but customer services skills as well
- Know what you can and cannot do for the consumer
- Know your boundaries/parameters—it's ok
- Let them down easy

# Listening Skills

- Listen and understand the consumer's issues
- Let the consumer speak without interruptions
- Be nonbiased with your suggestions

# Communication Skills

- Relay information clearly and concisely to consumers over the phone
- Have good written skills for consumers who choose to communicate by email or TTY
- When face-to-face with consumer, show proper body language that is consistent with the matter at hand

# De-escalation / Crisis Management

- Do not take matters personally
- Let consumer vent without interruptions
- Make sure consumer knows that you are there to help
- Utilize other resources around you
- Offer to follow-up at a later date



# Time Management & Prioritizing Responses

- Establish routines and stick to them as much as possible
- Get in the habit of setting time limits
- Utilize a day planner or Outlook Calendar to schedule events and follow-up calls
- Keep resources close at hand so you don't waste time searching

# Prioritizing Responses

- Consider consumer's needs
- Look at their deadlines
- What resources are available at that moment?
- Is there another team member who can assist?
- Keep your day planner/calendar close by to avoid overlapping of tasks
- Don't forget your other consumers

# Follow Up and Consumer Relationships

- Timely follow-up and call backs are simple ways to show you care and value them as a consumer
- Follow-up can earn you additional open consumers, which means additional agency revenue
- How do you feel when a business you solicited from follows-up with you?

# Questions and Answers

# The Art and Science of I&R: Connecting People & Resources

## The Nuts and Bolts of I&R Include...

- Record Keeping and Data Management
- Information Resource Management
- Policies and Procedures
- Shared Responsibility among Staff versus Dedicated Staff Position
- Community Collaborations

# Record Keeping and Data Management

- Helps assure accountability
- Facilitates long-term planning and resource allocation
- Identifies possible systems advocacy issues

AND

- Can provide verifiable data for funding requests, grant proposals, and policy initiatives

# Examples

- 23 referrals to Energy Assistance but only 6 received assistance (accountability)
- Increased contacts for transportation resources after the only accessible taxi in town is gone (planning & resource allocation)
- 10 calls regarding lack of effective communication for medical appointments (systems advocacy!)

# LINC I&R Form



## LINC Information & Referral

Repeat Caller?

<b>Name</b>	<b>Date</b>
<b>Address</b>	<b>Phone</b>
<b>City, State, Zip</b>	<b>Email</b>

R	IP	C	CX	Type of Information	R	IP	C	CX	Type of Information
				Advocacy/Legal, (ADA, Accessibility, Benefits)					Peer Counseling/Support
				Assistive Tech					Personal Assistance (Attendant Program)
				Case Manager/TSC, Cash Assistance, Finance Info, Payee					Physical Restoration
				Children's Services					Preventive Services
				Communication Services					Prostheses, Appliances
				Counseling & Related					Recreation Services
				Family Services (Emergency Resource, Senior Info)					Rehabilitation Tech
				Health Care/Rx					Therapeutic Treatment (Support Groups)
				Housing, Home Mod., Shelter Services					Transportation
				IL Skills & Life Training					Vocational Services (Education, Training, Employment)
				Mental Restoration					Youth Services
				Mobility Training Services					Other:

**MANDATORY Follow up on bold issues: DATE:**

**Contact type**

(Circle the appropriate one)

**Referred by:**

**REMEMBER to ask:**

Did you get what you need from us?



# Information Resource Management

- Develop and maintain accurate resource lists
- Catalog documents, publications, DVDs, etc.
- Web-based resources—consumer desk with accessible work station and assistance available
- Accessible formats

# Catalog Example

- ADA Title III
  - ADA Accessibility Guidelines
    - Common Problems in New Construction (Hotels, for example)
  - Databases searchable alphabetically, type of service, geographic area, eligibility, etc. Cross-Referenced!

# Another Catalog Example: Accessibility

- ADAAG
- Fair Housing Standards
- Visitability
- ANSI Standards
- Building Codes
- Universal Design

# Policies and Procedures

- Information Provision
- Referral Provision
- Crisis Intervention
- Cooperative Relationships
- Promotion and Outreach
- Follow-up
- Disaster Preparedness

# Shared versus Dedicated Staff Responsibility

## Shared Approach

- Can be more flexible
- Empowers staff
- Can lead to inconsistent customer service

## Individual Approach

- Can be more Specialized
- Can free up and support other staff
- When is an I&R *more* than an I&R?

# Community Collaborations

- 211
  - General I&R versus I&R specific to disability issues
- ADRCs
  - Information and assistance on long-term support options
- Other I&R Providers
  - Other resources and databases

# Questions & Answers

# I&R Resources

- [www.airs.org](http://www.airs.org) – Standards for I&R
- [www.wnyil.org/compendium](http://www.wnyil.org/compendium) – Forms, Policies, Procedures
- Local and regional Alliances, 211



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# Wrap Up and Evaluation

Please *click the link below* to complete your evaluation of this program:

<https://vovici.com/wsb.dll/s/12291g54cc7>

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