CIL-NET Presents…

Effective Service Coordination: Engaging Consumers with a Holistic Approach to IL Services

Effective Information & Referral Services that are Responsive to Community Needs

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10:00 A.M. - 12:00 P.M.

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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 continued

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
• 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?
Art and Science: 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 is gone (planning & resource allocation)
- 10 calls regarding lack of effective communication for medical appointments (systems advocacy!)
LINC I&R Form

See LINC’s Information and Referral form in your materials packet.
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 Constructions (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

Got questions?
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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