

CIL-NET Presents...

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

***Elements of an Effective
IL Service Coordination Model***

March 27, 2013

9:15 A.M. - 10:30 A.M.

Presenter:

Deb Langham, Independence *First*

Centers for Independent Living

Centers for Independent Living are the go-to place for people with disabilities to become empowered to have the life they have dreamed...



Distinct Characteristics

Independent Living Centers are distinctly different from other social service agencies. Some of the things that set us apart:

- Consumer Led/Consumer driven
 - Consumers are involved in:
 - Making decisions about our agency
 - Determining advocacy priorities
 - Determining for themselves, their goals and the way they want to reach those goals.
 - Determining whether or not they even *want* to work with us!

More Distinctions

- Nothing about us without us
 - People with disabilities are the BEST people to ask about what they want or need to live independently
 - We (staff) can help point out options
- More than 50% of our staff, management and board of directors are people with disabilities



How Distinctions Impact Services

Our differences positively affect how we provide services to our consumers

- We talk to people that we encounter as equals
 - Listen to what they have to say without judging
- We are partners in the IL experience, working together to enhance independence, trying to avoid...

The Social Service “Run Around”

- Via telephone transferred from extension to extension, only to be put on hold for hours, or getting hung up on. Most likely never getting the information needed.



More “Run Around”

- Showing up for scheduled appointments and are told, no, you have the wrong day...transportation, child care, personal care, etc. has to be rescheduled.
- Given a list of resources to contact, only to find, after spending hours on the phone, some of them no longer exist, or don't apply to your situation or the agency doesn't actually *provide* that service.
- One of my personal favorites: calling a resource given to you by another resource only to be referred back to the first resource!

There's an Easier Way

We don't want our consumers to have these frustrating experiences at our centers! Instead, we need to be thinking, "how easy can we make this?"



Easier Way, cont'd.

CILs can do a great deal to address how services we provide can be as seamless and interconnected and easy going as possible. After all, we want to reduce stress and frustration for our consumers while giving them the empowerment tools they need to live a full and satisfying life.



Seamless Service Delivery

Seamless service delivery begins at the CIL and almost always begins with an information and referral (I&R) contact.

- A consumer initially speaks with staff handling the I&R contact and information is exchanged. While the caller may want information on county long-term care services, skilled staff will ask open-ended questions leading to other needs that will in turn result into a referral for other services at the CIL. (Use those interview skills!)

Effective Internal Referral

How staff handle this internal referral is critical. At our agency, the caller is given referral information and the option of:

- making the contact themselves (ideal)
- making the contact together
- having the staff make the contact for them (if necessary)

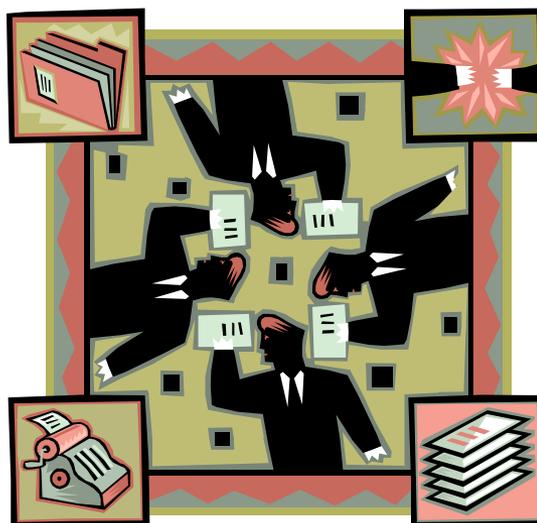
then...FOLLOW UP



Information & Referral

WHAT WE DO

I & R Team: A team of IL specialists whose duties include handling walk-ins and I & R Calls.



I & R continued

Some needs are to be addressed immediately by the I & R Team. Such as:

- Explaining information in time sensitive correspondence
- Domestic violence situations
- Shelter calls
- Evictions
- Food pantries



Beyond I & R

- When appropriate, the person is given an option to work with an IL Specialist on issues that aren't of immediate need; perhaps issues relating to the circumstances that led to their visit or to their phone call.



Connecting the Dots

In addition to working with the consumer on their goals, The IL Specialist will work with their consumer to connect them with other services in the IL Department or agency.

- Assistive Technology
- Nursing Home Transition
- Disability Rights Discrimination
- Sports/Rec activities
- Computer training
- Housing



Service Coordination

Additionally, your consumer may be interested in other services offered at your agency. We make this referral by either:

- Scheduling an appointment/meeting with the other department (either in person if everyone's in the office or by phone)
- Asking the contact from the other department to call the consumer
- Making the call with our consumer
- Giving the information to the consumer to make the call

Service Coordination, cont'd.

Meet with your consumer and with coworkers that will be assisting your consumer. This clarifies what everyone is doing to assist the consumer.

- You can make sure that your consumer understands what will be happening with the other staff person and what he/she may expect.
- Clarifies what the consumer's responsibilities are while working with this staff person
- Lets the consumer know that he/she is supported by staff in any service received at your center.
- Allows you to trouble-shoot any problems or misunderstandings

Service Coordination, cont'd . 2

- Often, center staff will help consumers connect with services in the community that they need or want.
- Many times the referral agency is one that (in all likelihood) has or will have some type of control/say so/opinion over your consumer's life.

Service Coordination, cont'd. 3

When we help consumers connect with another agency, it is helpful to:

- Call other agencies
- Contact other agencies by email
- Visit other agencies
 - Learn their eligibility criteria
 - Learn the process of accessing these services

This allows you to speak to your consumer with confidence about the services or supports they need and eliminates the frustration factor.

Service Coordination, cont'd 4

- Develop relationships with key personnel at outside agencies. If you have a good working relationship, it can help you to cut through the red tape for your consumer and/or can give you helpful hints on how to deal with others in their agency.
- Try to look at situations or circumstances from the agency's point of view. This can help you to become a better advocate, resource, mediator for your consumer.

Examples of Outside Agencies

- State representatives
- Transportation
- County entities (ADRCs, Aging, Children's services)
- Vocational Rehabilitation
- Housing agencies (HUD, WHEDA)
- Targeted disability organizations (MS Society, Mental Health groups, agencies serving people with cognitive disabilities, etc.)
- Other advocacy organizations (protection & advocacy, organizations, etc.)

Enhance Services through Networking



Our staff have joined local, state, and national taskforces, coalitions, committees, and groups, working on issues that affect people with disabilities. This allows us an opportunity to network with other professionals and service providers and build relationships while working together.

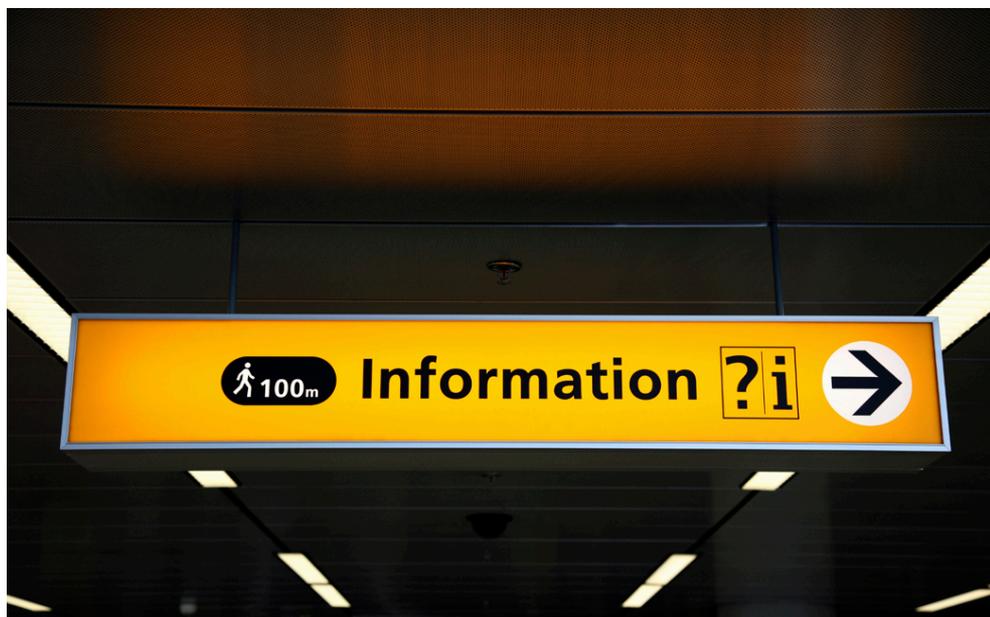
- Long-term care, Assistive Technology, Housing, Nursing Home Transition, Housing Authorities, NCIL Taskforces/Subcommittees, SILC



Courtesy of the George Bush Presidential Library

Now you know **WHAT** we do....

But **HOW** do we do it????



Be Prepared for Effective Service Delivery

Priority: Hire Qualified Staff with Disabilities

- Successful service delivery begins at the point of hiring staff. Quality centers promote and support the hiring of qualified individuals with disabilities; *not because they are “required” to, but, because philosophically and ethically, it is the right thing to do.*



Be Prepared for Effective Service Delivery, cont'd.



Advertise!!! Get the word out!

- Be seen by people with disabilities.
 - At other centers
 - In disability publications in your area
 - At junior colleges, and universities
 - At the Division of Vocational Rehabilitation, job centers, etc.

Be Prepared for Effective Service Delivery, cont'd. 2

Accommodations!!!

- Provide accommodations from the application process through employment
 - Interpreters
 - Large Print Materials
 - Braille
 - Ergonomic furniture
 - Etc...



Be Prepared for Effective Service Delivery, cont'd. 3

- Set the precedent with your staff for what consumers can expect from your center
- Supply a clear job description and/or work plan so that it is clear what is expected of the new IL Specialist.



Staff Training

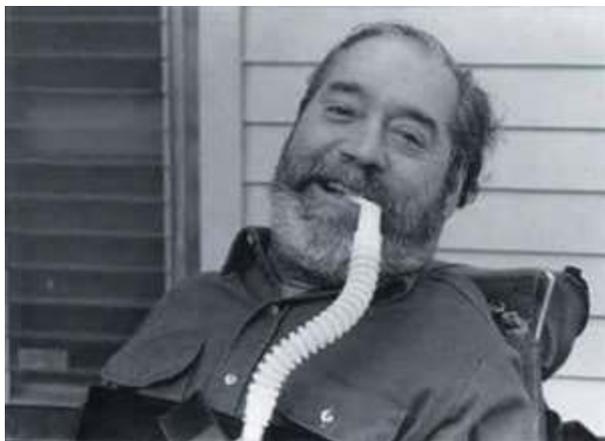
Quality centers understand the importance of comprehensive, basic training for their staff

Examples:

- IL History and Philosophy
 - Independent Living: A historical Perspective of a Movement and Philosophy
 - An Orientation to Independent Living Centers
 - History of Independent Living

More Resources

- Essential readings in IL
 - Some great figures:
 - Justin Dart
 - Ed Roberts
 - Marca Bristo



More Resources, cont'd.

Suggested Articles:

- And Justin for All
- Ed Roberts, Founder of the Independent Living Movement
- Leaders for Now and the Future-Profiles on Harriet McBryde Johnson
- Marca Says
- Unspeakable Conversations, by Harriet McBryde Johnson

More Resources, cont'd. 2

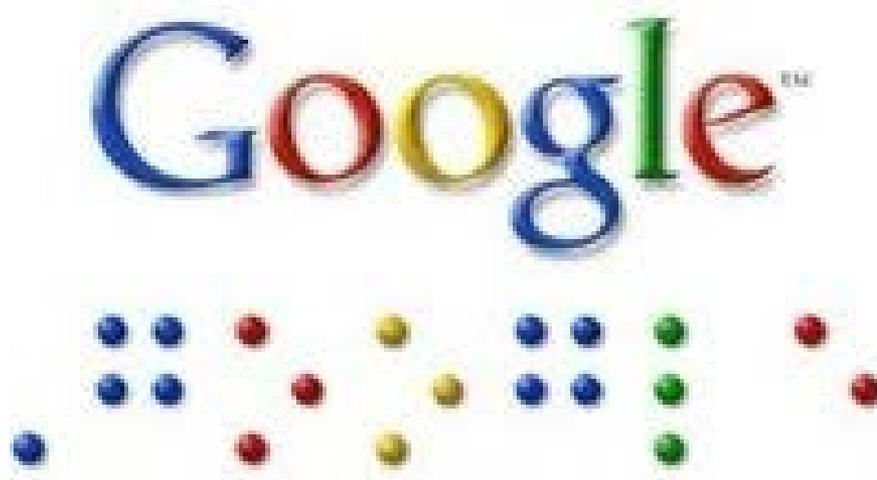
Suggested Articles:

- Tribute to Reverend Wade Blank
- Mothers of the ADA
- Elizabeth Savage and Pat Wright
- Reminiscences of Ed Roberts
- The Disability Gulag

More Resources, cont'd. 3

Countless other materials are available for free!

Check out ILRU's website—<http://www.ilru.org>



Peer Support

(Much more later from our experts!)

- Peer Support
 - Training and practice for Peer Support Specialists
 - Policies and procedures for Peer Support
- Confidentiality
- Ethics
- Job Application
- Background Check



Goal Development

(Small Review from yesterday)

The purpose of the Independent Living Goal is to empower our consumers to choose and write their own goal; creating accountability, ownership and investment on the part of the consumer. Quite the responsibility to assist another person on the road to empowerment and independence.

Goal Development, cont'd.

Make sure that staff are prepared to, *at a minimum*:

- Listen to the consumer and document needs/wants/desires
- With consumers, write goals and activities that are achievable and measurable
- Activities needed should represent a logical sequence to achieving the goal
- Take care to develop separate goals when your consumer is interested in independence in several areas.

Goal Development, cont'd. 2

- Assist consumers when necessary to identify steps and activities needed for the success of their goals.
- Meet/communicate often with your consumer; evaluate progress on goals often.
- Document! Document! Document!

Life Skills Training & Independent Living

- Personal care
- Coping
- Financial management
- Social skills
- Household management.
- This may also include education and training necessary for living in the community and participating in community activities.—704 definition.



Life Skills Training & Independent Living – Some of our curricula



- Wellness & Nutrition
- Disability Rights Legislation
- Advocacy, Assertiveness
- Money Management
- Time Management
- Self-Esteem
- Dealing with Conflict and Anger
- Dealing with Stress
- Self-Awareness
- Communication
- Setting Goals
- Making Decisions
- Avoiding Frauds and Scams
- Home Management
- Hiring a Personal Care Attendant
- Emergency Preparedness
- And more!

Curriculum as an Aid to Staff

Our curriculum is available to staff as an aid when working with consumers to learn a new skill. Sharing the curriculum has often sparked ideas of what consumers may want to work on to achieve independence. Skills training is an avenue to our consumers achieving their goals.

AN EXAMPLE.....



Skills Example

A consumer, who used a wheelchair, wanted to shop at a grocery store near his home. However, aisles in the store were blocked with merchandise boxes and the accessible parking space was stacked with dirt! After discussing the situation with his IL Specialist, the consumer decided to improve his advocacy skills by receiving training in assertiveness and communication; to be able to address the store manager with confidence.

Skills Example, cont'd.

Our consumer developed a skills training goal with steps that included working with his IL Specialist to improve his assertiveness and communication skills. After a month of practicing good techniques, learning what to say and how to say it (activities listed on the IL goal), our consumer felt ready to talk with the store owner. At this point, he developed an advocacy goal, outlining how he would approach the store owner; and learning about the ADA and access laws in Wisconsin.

Skills Example, cont'd. 2

The meeting between the store owner and our consumer was scheduled and it went very well. The store owner was apologetic and promised to clear the aisles and the accessible parking spot. While it took longer than expected, the barriers were removed from inside the store. Removal of the dirt took considerably longer, but, at long last was finally removed.

Skills Example, cont'd.3

Bottom line, through skills training, our consumer learned skills in:

- Advocacy
- Assertiveness
- Communication

And developed knowledge of ADA and Wisconsin Access laws

And yep, we documented our consumer's training and process all along the way!

Effective Service Delivery

What can happen when IL skills, an IL Specialist, and a Curriculum come together?!



Effective Service Delivery Can Be Fun!

- Curriculum and Activities
 - Interactive games
 - Hollywood Squares
 - Jeopardy

HAVE FUN!



More Fun Resources

- Payday
- Life
- Monopoly
- Uno
- Play money
- The Cosby Show Game



Game Plan

- Later, as agency funds allowed, we slowly began to purchase educational games (available on the Internet and educational stores) such as Allowance and Life Stories.
- Other curricula we purchased from grant funds such as Anger Management and Cooking Skills.

Game Plan, cont'd.

- Other curricula were developed out of requests from our community. Several years ago, we received funds from our SILC to develop a high school transition curriculum. One of the classes addressed personal safety tips for teens that discussed relationships (good and bad), personal safety tips, learning how to say “no” and what to do when experiencing abuse or violence.

Game Plan, cont'd. 2

- Our Boundaries and Personal Space became so popular that teachers were requesting that we teach the class for all their students with and without disabilities.
- Because of the demand, we began to modify the class for middle school students and adults with developmental disabilities.

Game Plan, cont'd. 3

- This class morphed into a five part class:
Safe Relationships, Safe Places.
 - Boundaries and Self-Esteem
 - Healthy Relationships
 - Dating and Romance
 - Sexuality and Relationships
 - Relationship and Community Safety

Start Low, Go Slow

- Rome was not built in a day, but, any center can begin small and build their skills training library and materials.
- When I started out a *long, long, time ago, in a galaxy far, far, away*, I began with an outline depending upon what my consumer wanted to learn. From there, I researched information that would be helpful. And yes, you guessed, it, the Internet wasn't around back then.

Start Low, Go Slow, cont'd.

- I built upon the information I found, used my own experiences and came up with a training structure (learning objectives, vocabulary words, activities).
- Other centers may have life skills training curricula they would be willing to share. Feel free to contact me, I play nice in the sandbox!
- Whatever materials you use, staff should become familiar with it and observe life skills training in action to build upon *their* skills and to become an effective guide to their consumer.

Advocacy

- Expose staff to Disability Rights Legislation (Rehab Act, ADA, etc.). Make sure that staff have a good, basic understanding of the Rehab and ADA Acts as it is our foundation! Materials and learning opportunities available through ILRU website.
- It is important for staff to know how to advocate first, before trying to assist a consumer with their advocacy needs. So, provide as much advocacy exposure and experience to staff as possible!

Ways to Incorporate Advocacy

- Work plans—advocacy and legislative goals
- Visiting elected officials
 - city Aldermen/women
 - County Supervisors
 - State senators and representatives
 - Visiting elected officials
- Legislative Visit Days

Ways to Incorporate Advocacy, cont'd.

- Other Advocacy
 - Letters, emails, phone calls about disability rights legislation/laws
 - Join together with other disability advocacy groups
 - ADAPT
 - Survival Coalition
 - Make it Work Milwaukee

Information and Referral

How does your center handle I&R, community resources?

- We subscribe to several I&R databases in our community
- We also share the resources we have developed through our intranet.
- Utilize the I&R learning session from yesterday!

Ethics and Confidentiality

Many centers have ethics and confidentiality statements that must be signed before employment begins. Providing training in these areas is helpful to staff to guide their behavior and help them to understand boundaries between consumer and IL Specialist and any “sticky situations” they may find themselves in.

See Code of Ethics sample.

Other Departments at Your Center

- Help staff to become familiar with what their co-workers do, other departments, or/and programs at your center, including knowledge of the center's website.
- Your center's relationship to your state's **SILC**: it's very important to learn how the SILC can assist staff in assisting their consumers. Is your center part of the development of the State Plan for Independent Living?

Staff Safety

Consider developing **Safety Guidelines** for your staff when they are visiting in consumer homes that include

- Using a “buddy system”
- Observing and assessing the environment
- Using agency cell phone with built in GPS



Staff Safety, cont'd.

- Some type of sign in/out system
- Trainers relating to personal safety and dealing with difficult situations and people.
- Staff's ability to choose NOT to enter a situation in which they do not feel safe
- See sample

Other?



Staff Development Resources

Free online trainings can be found on the NCIL and ILRU websites. Trainings are also available on numerous independent living topics.

A great place to start 😊

<http://www.ilru.org/html/training/rapidCourses/index.html>

- **CSR Documentation**
- **Interviewing and Assessing Needs**
- **Goal Setting**

Staff Development Resources, cont'd.

Consider making IL-related videos (captioned of course) available to staff

- Ten=Commandments
- Ed Roberts, His Words, His Vision
- Lives Worth Living
- My Country (older video, but does an excellent job discussing how the Civil Rights Right influenced development of the Rehab and ADA Acts)



Staff Development Resources, cont'd. 2

Ask your colleague network what they might recommend, or are they using training materials that can be shared. No reason to “reinvent the wheel” when all you may need to do is “tweak” it a bit.



...AND I HAVE FOUND THIS ONE WORKS A LOT BETTER.

Other Important Trainings for Staff

Comprehensive **CSR training** to ensure that staff understand the necessary components

- Goal/waiver
- CAP/Grievance
- HIPPA, EEOC & Limited English Proficiency
- Eligibility
- Accommodation

Other Important Trainings for Staff, cont'd.

- Provide comprehensive documentation and database training. Remember, *if you didn't enter it or write it down, it didn't happen!*
- Consider providing a "checklist" for the CSR that lists the documentation steps needed. See the sample.



Staff Mentoring

Provide a mentor or role model for new staff—
Someone that is a seasoned professional, who
knows the “ropes;” someone that the new staff
person can shadow and learn the aspects of their
new role as an IL Specialist.



Staff Learning

Working with their mentors and consumers, staff will learn and experience

- How to schedule and keep appointments with consumers; that is, the *importance of being reliable*
- Observation skills, noting the techniques needed for a consumer-driven discussion
- How to ascertain from the consumer their wants or needs and the barriers to success

Staff Learning, cont'd.

- To ask open-ended questions
- What the consumer's strengths are and how to incorporate that information into success
- To be a good listener
- To take good notes (much of what we do with our consumers will be based on these notes)
- Documentation procedures & why they are important.
- How documentation turns into reportable data for the 704 report

Staff Learning, cont'd. 2

- Practice, practice, practice goal development with your mentor, supervisor, and co-workers.
 - Set-up a co-worker to be the “consumer” for the new staff person
 - Go through the entire process of initial interview to goal development to activities related to goal achievement and finally to closure
 - Include documentation and data entry requirements.
 - Give helpful, constructive criticism; feedback that will improve staff performance.

Continuous Staff Development & Growth



- Routinely review CSRs documentation and data entries. It's very important to catch errors and trouble-shoot, early on, any problems that you may spot.
- Quality Assurance: We ask staff to check one another's closed files for accuracy and we also have available program clerical staff to review them as well. We have developed a checklist for this procedure to ensure we are in compliance. See sample.

Continuous Staff Development & Growth, cont'd.



- Give serious thought to conducting regular monthly meetings with your IL Specialists. This is a great peer support forum for staff! We meet every other month and discuss consumer problems that staff may not know how to handle, discuss successes and to brainstorm solutions with peers.
- Encourage IL focused/related trainings for your staff. Others may be available in the community.

Effective Service Delivery Summary

When your center has a clear procedure on how to assist consumers and connect them to resources in your CIL as well as to those outside of your CIL in a seamless and integrated manner and when the appropriate staff are hired, trained, and mentored, and provided ongoing support, they will be ready to offer valuable, quality assistance and guidance to consumers wanting to reach their independent living goals.

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