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

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Phone</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>Email</td>
</tr>
</tbody>
</table>

**Type of Information**

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

**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
I&R Resources

- www.airs.org – Standards for I&R

- www.wnyil.org/compendium – Forms, Policies, Procedures

- Local and regional Alliances, 211
Contact Information

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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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