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Get to the Core of It:
Information & Referral

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Presenters:
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Session Objectives

- Explain critical role of I&R as gateway to providing CIL consumers with information, knowledge, and resources in an efficient and responsive manner.

- Describe strategies to organize, track, and maintain comprehensive and extensive resource information on numerous disability-related topics.

- Describe best practice policies, procedures, and staff training that result in highly effective interactions with consumers.

- Describe how to conduct follow up with consumers to determine effectiveness of the CIL's I&R service delivery.

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

I&R Core Service: The Human Approach – The First Point of Entry, cont'd.

- Resources offered within the community
  - Housing
  - Employment
  - Financial Assistance
  - Healthcare
  - Personal assistance services
  - Assistive technology
  - Durable Medical Equipment

Customer Service

- For an I&R Specialist to succeed at providing relevant information, they must possess not only knowledge, but also customer services skills.

- 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 him/her to navigate the system and/or facilitate, as appropriate.

- 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?

Ability360 www.ability360.org

- Martha Macias – Information & Referral Program Coordinator

    (602) 296-0536 or: martham@ability360.org

- Darrel Christenson – VP of Community Integration, (602) 296-0530 or: darrelc@ability360.org

Questions and Answers

If you have questions, we have answers (and/or referrals)?

I&R as a Core Service: The Art and Science of 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 ensure 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

LINC Information & Referral

Name	Date
Address	Phone
City, state, zip	Email

Info Requested

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

Follow up on bold issues
DID _____ Did not _____
DATE _____

Contact type:
(Circle the appropriate one)

PERSON WITH DISABILITY
Cognitive
Mental/emotional
Physical
Hearing
Vision
Multiple Disabilities
Other

OTHER

Referred by:
_____

Referred to:
_____
_____
_____
_____
_____
_____

Would you like to be included in our:
Mailing list? ___Yes ___ No

Email distribution list? ___Yes __No

RELATED INFORMATION
_____
_____
_____
_____
_____
_____
_____

MATERIALS SENT
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Don't forget to ask:
Did you get what you need from us?
Yes   no

What type of AT equipment is being requested that we do NOT have?
_____
_____
_____
_____

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 II
  - 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 all 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

Living Independence Network Corporation (LINC) Contact Information

- www.lincidaho.org

- Roger Howard, Executive Director

- (208) 336-3335 or: rhoward@lincidaho.org

Questions and Answers

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I&R Resources

- www.airs.org – Standards for I&R

- http://www.ilru.org/ – Forms, Policies, Procedures, resources, training materials

- Local and regional Alliances, 211

Wrap Up and Evaluation

Please *click the link below* to complete your evaluation

of this program:

http://www.surveygizmo.com/s3/3535509/CIL-NET-Webinar-Getting-to-the-Core-of-it-Information-and-Referral-June-21-2017

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