

IMPLEMENTING
AN
INFORMATION AND REFERRAL
(I&R)
SERVICE

Presented by

NEBHANDS

A Faith Based Community Initiative

and

United Way of the Midlands

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Course Interview

How to Implement an I&R Service

This four (4) hour course defines the characteristics of an I&R services and its staff, looks at tools needed to do the job, and how to assess a caller's needs and provide the information they are seeking.

A Brief Outline

Time	Outline
5 Minutes	I. Introduction
5 Minutes	II. What does and I&R do? A. Information giving B. Referral giving
5 Minutes	III. Characteristics of an I&R A. Confidential B. Non-stigmatizing C. Reliable D. Neutral E. Accountable
45 Minutes	III. Staffing A. Characteristics of an I&R Staff Person while on the phone B. Maintaining caller confidentiality C. Staff training program
90 Minutes	IV. Determining the callers need and finding the appropriate referral A. Assessment B. Problem solving
45 Minutes	V. Information and Referral A. Empowerment B. Advocacy C. What can you do D. Closing
5 Minutes	VI. Conclusion

Supplies and Equipment Needed

1. Flip chart and easel
2. Magic Markers
3. Masking Tape
4. Power Point Presentation, laptop and projector or transparencies and projector
5. Handouts of Power Point Presentation
6. Role Plays
7. Keyword List
8. Evaluations

Trainer's Outline

Resources

Notes

- Power Point Presentation
- Role Play 1
- Role Play 2
- I. *Introduction:*
 - A. *Trainers*
 - B. *Housekeeping*
 - C. *Learning goals and expectations*
 - i. *Characteristics of an I&R services and its staff*
 - ii. *Tools needed to do the job*
 - iii. *How to assess a caller's needs and provide the caller the information they are seeking.*
 - II. What does an I&R do?
 - A. Information giving ranges from giving an organization's/agency's phone number and address to detailed information on the community service system
 - B. Referral giving provides a referral service as well as information. This requires an assessment of the situation, evaluation of an appropriate referral, retrieving the information, and giving the correct information to the caller. It may also require exploring alternatives if there is no service available.
 - III. Characteristics of an I&R
 - A. Confidential.
Information obtained during the interview is not shared with anyone without the caller's consent or unless the caller is in immediate physical danger or thinking of harming him/herself or another.
 - B. Non-stigmatizing.
No person should be made to feel ashamed, different or deficient for using the service.
 - C. Reliable.
Accurate information and dependable service is provided to avoid wasting the time and effort of the caller.

D. Neutral.

Neutral service available to all people because it is non-partisan and non-sectarian. It should have a broadness of scope that covers a full range of human needs.

E. Accountable.

Accountable to the callers and the community it serves for the service it provides and for reporting to the appropriate agencies, planning bodies and organizations its experiences in linking people with community services.

IV. Staffing

A. Characteristics an I&R staff person displays when on the phone with a caller

i. Sensitivity

The staff should be sensitive to the feelings and problems of all people.

Hear what they don't say as well as what they say.

Needing help is not a sign of laziness or stupidity.

ii. Efficient

Calls should be handled thoroughly, professionally and within a reasonable period of time as there may be other callers trying to get through.

iii. Friendly

One of the goals of the I&R Specialist is to build rapport with the caller. It makes it easier to obtain information if the caller is comfortable talking to the I&R Specialist

iv. Flexible

Each inquiry should be treated individually to prevent requests from being pigeon-holed, making it possible

to look for alternative solutions.

Resources

Notes

Role Play 3

- v. Impartial and Nonjudgmental
 - a. Maintain an impartial, objective, and nonjudgmental stance
Sometimes an I&R Specialist feels strongly about a situation the caller is calling about, e.g., domestic abuse, homosexuality
 - b. The agenda must be that of the caller.
If the caller is not ready to leave a domestic abuse situation don't force the issue, this will cut them off from a resource (your service) in the future when they might be ready.
 - c. Taking care of your I&R Specialist by providing avenues to discuss situations that might arise or other means to unwind after a particularly difficult call.

B. Maintaining caller confidentiality

Handout: Confidentiality Policy

FlipChart – Why do we need a Confidentiality Policy?

- i. Confidentiality Policy should outline consequences of breaking confidentiality of caller.
- ii. If caller is a neighbor, a relative, or someone you know in the community, consider passing the caller to someone not as close to the situation.
- iii. Ask the caller for permission to share information with other agencies.

C. Organized training program to ensure quality of service (these people don't grow on trees).

- i. Training the I&R Specialist with the tools to do the job.
 - a. Physical Needs
 - 1. Phones
 - 2. Resources: Rolodex, book, computerized, Internet, phone book
 - 3. Standardized forms, paper or computerized, as a means of gathering demographic information on the caller.

Flipchart: What kind of information do you want and why?

- a. Who is calling? – men, women, ages, races, single, married, with/without children, number of children.
 - b. Where are they calling from? – city, rural/urban areas, zip code.
 - c. What are their needs? – shelter, food, financial assistance, substance abuse treatment
 - d. What agencies are you referring to? Which ones get the most referrals?
 - e. How does the caller hear about your service?
 - f. Means of correlating the information you collect
 1. Tally sheet
 2. Computer
- V. How to determine the caller's need and resources
- A. Assessment
- i. Contact - Establish Rapport – concentrate on feelings behind the content
The statement "I am pregnant" can reflect different feelings depending on the person and situation.
 - a. Don't be afraid to name a feeling, if you are wrong the caller will let you know and it will help clarify the situation and you can continue with new information.
To the example of I am pregnant you could say: "Congratulations, you must be thrilled" and get the response: "Are you crazy!! I'm 49!!"
 - ii. What is the caller's need
 - a. "What can I help you with?" or "What's going on?" or "How can we help you?"
 - b. Clarification – "So you need food?"
 - iii. Gather demographic information

Flipchart: Why is demographic information necessary?

- a. Eligibility for programs
 - 1. The client's age, sex or ethnicity may qualify them for certain programs and ineligible for other.
 - 2. Does the person have children and the ages of the children can determine what agency you can send them to for services
 - 3. Where the client lives may qualify or disqualify them from services, e.g., part of town, county
 - b. Are you reaching the population you have targeted or do you need to do outreach to others in the community
 - c. Justify the programs existence and support
- B. Problem solving
- i. What are the caller's resources
 - a. Has this happened before? What did they do then?
 - b. Family
 - c. Church
 - ii. Agency resources
 - a. Information about the agencies to which your agency refers describing the services provided and access information
 - b. Alternative sources of information e.g., the internet, library
 - c. Accessing data
 - iii. Indexing - a system for accessing the correct agency(ies)

Overhead: Sample Keyword List

- a. Keywords – keywords from the descriptive information about an agency, e.g. food pantry, utility assistance.
 - i. Alphabetized list
 - ii. Limitations

1. Duplications of services under different keywords, e.g., grief, bereavement, death and dying services
 2. Communicating between agencies using different keyword system.
- b. Taxonomy codes – a hierarchical system that breaks services down from general to specific, represented by an alphabetic/numeric code.
- i. Advantages
 1. Clarity – each code has a definition that everyone using the system agrees to allowing,
 2. Consistency – internationally used system
 3. Allows accurate communication between agencies, e.g.,

PH-500-100 is Bereavement Support

Group: Mutual support groups whose members are people who have experienced the loss of a loved one. The groups focus on helping participants accept their loss, express their grief, move through the bereavement process and put their lives back together.

RP-450.100, Bereavement Counseling:

Programs that provide emotional support, problem-solving assistance, information and guidance for people who have recently lost a loved one. Included are counseling programs for widows and widowers, children who have lost a parent, parents who have lost a child and people who are in other similar situations.

4. Flexibility because new services are always being developed to handle new needs a new taxonomy code can be developed to meet the need in a short amount of time.
- i. Limitations
 1. Sounds scary

2. Requires some training to use effectively

- c. Primary services, not secondary services
 - i. The primary service is the service that can be accessed by anyone in the community, e.g., support group for alcohol addiction
 - ii. A secondary service is one that can only be accessed by people participating in the program, e.g., support group for alcohol addiction for residents of a halfway house

VI. Information and/or referral

A. Empowerment

- i. Reinforce the idea that the caller is capable of handling his own problems. Information and Referral gives the caller a more direct route to the correct resource.
- ii. Develops future problem solving skills
- iii. Acknowledges the caller's right to self-determination.

Do not use the words: If I were you, I'd or... What you need to do is...

If you tell the caller what to do and the caller doesn't succeed, you are the reason success wasn't met not anything the caller did or did not do, e.g., "What you need to do is go to George's Place before noon tomorrow and bring your social security card and your disconnect notice with you." The caller goes to George's Place at 3:00 p.m. three days later without any documentation and doesn't get help. It is the I&R Specialists fault. Throw it into the caller's court: "George's Place might be able to help you. To qualify for assistance you will have to be there before noon tomorrow with your social security card and your disconnect notice."

Or even: "This is the number to George's Place. They might be able to help you. You call them and they can tell you what documentation you will need and the best time to come."

- iv. To empower the caller:
 - 1. Inform the caller of what is available in the community
 - 2. Explain how the system works, how to access services, and if known, what documentation is needed
 - 3. If appropriate, explain the caller's rights to them
 - 4. If necessary, prepare them for the questions they may be asked and/or how to present information to the agency, e.g., the caller is irate over the way she has been treated by her state caseworker and wants to make a complaint. When talking to you she is very agitated and swearing. Acknowledge her frustration and suggest a way that she can present her case without antagonizing the person to whom she is making the complaint.
- B. Advocacy
 - i. When the client will not be able to obtain services without assistance, e.g. language barrier, inability to read or write, elderly and confused about the process.
 - ii. When the I&R Specialist has a relationship with an agency and the agency will pay more attention to the Specialist than to the caller.
- C. What can't you do
 - i. You can't manufacture services that not available.
- D. You can
 - i. Provide information and referrals if the service exists and the caller is eligible.
 - ii. Direct the call - "*What is going on today that I can help you with?*"
 - a. Callers who are lonely and just want to talk
 - b. Callers who want to tell you their life story – in detail
 - c. Callers who have mental health issues
 - iii. Learn to tell caller the service isn't available in the kindest way possible.
 - a. The caller will accept that information or the
 - b. caller will be frustrated and take the frustration out on the I&R Specialist.

- c. Acknowledge the feelings being expressed by the caller. “I know you are angry that the shelter is full, but there is not other shelters available and there isn’t an agency that can put you up in a motel.”
 - E. Closing
 - i. Review the options discussed with the caller, e.g., *“I have given you 3 agencies that do family counseling, you can call any of them between 8-5, Monday through Friday.”* Or *“I gave you the number for the shelter, but if they are full, we discussed the possibility of you calling a friend or your mother.”*
 - ii. End the call.
 - a. Ask caller to call back if they have further needs.
 - b. Do not say – *“I’m going to let you go now, okay?”* With some people it won’t be okay, the caller will want to talk longer or as long as you will let them.
 - c. If the caller is abusive: *“I am sorry I am unable to help you at this time”, and hang up. I&R Specialists do not have to take abuse from callers.*
- VII. Conclusion:
- i. Review the learning goals and expectations:
 - a. Characteristics of an I&R services and its staff.
 - b. Tools needed to do the job
 - c. How to assess a caller’s needs and provide the caller the information they are seeking

Bibliography

ABC's of I&R, Alliance of Information and Referral Services, Seattle, WA

HelpLink, Training Manual, Northern California Council for the Community, San Francisco, CA

United Way of the Midlands' 2-1-1 Training Manual, Omaha, NE

Handouts

H1 – Learning objectives

H2 -- Power Point Presentation Handout

H3 -- Confidentiality Policy

H4 -- Keyword List

H5 -- Role Plays


H6 -- Evaluation

Learning Objectives

Participants will:

- Be able to list three characteristics of an I & R service
- Be able to list three characteristics of an I & R staff member
- Understand how to assess a caller's need and provide information


Slide 1



**Maintaining an
Information and Referral (I&R) Service**

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Slide 2



The Database Serves:

- Your own agency
- Other agencies in the community
- Individuals and families needing assistance
- Funders and policy makers


Slide 3



Other Uses for Your Database

- Directory
- Pamphlets and brochures
- Lists


Slide 4



Keeping the Database Current

- Formal updates:
 - Mailings
 - Emails or FAXes
 - Phone calls

Slide 5



Keeping the Database Current

- Informal Updates
 - Newspapers
 - Professional magazines and newsletters
 - Agencies
 - Interagency meetings


Slide 6



Professional Development

- Conferences and seminars
- Online training
- Interagency meetings


Slide 7



Maintaining and Developing Services

- Who to bring to the table
 - Agencies and organizations with similar agendas
 - Government agencies with similar agendas
 - Local businesses
 - Private citizens


Slide 8



Mission Statement

- Short-term goals
- Long-term goals


Slide 9



Effective Meetings

- Accomplishes goals
- Members communicate freely
- Disagreements are discussed and resolved
- Issues are decided by consensus


Slide 10



The Meeting

- Where and when
- A neutral facilitator
- Recorded minutes


Slide 11



Barriers to Collaboration


- Necessary partners are excluded
- Partners are not included in the initial planning
- The goals of the collaborative are not consistent with the mission of the individual or agency

Slide 12



Barriers to Collaboration (cont.)

- Partners are unwilling to work together or understand the constraints of others
- The agency leadership is not supportive of the collaborative effort



Evaluate

- Evaluate your progress, make changes where necessary, and keep your goal in mind

United Way of the Midlands Information and Referral Services

Client Confidentiality Policy

Date: May 8, 1998

Purpose: To provide staff and volunteers guidelines on client confidentiality issues.

Policy: All client related information must be confidential. Staff and volunteers are not to discuss information which may violate an individual's right to privacy. Divulging information may be cause for dismissal or possible civil liability. When it is necessary to share information about an Individual with another agency or human service professional this is done only with client consent. Any questions on confidentiality issues should be addressed to the Director of Information and Referral Services or the Vice President of Volunteer and Community Services.

Director of Information and Referral
Services

Vice President of Volunteer and
Community Services

Keywords

Alcohol Assessment
Assistive Technology
Bereavement Support Group
Clothing
Child Abuse Reporting
Child Care Referrals
Counseling
Disability
Domestic Abuse
Immunizations
Food Pantry
Job Training
Legal Assistance
Mental Health Inpatient Treatment
Parent Training .
Pregnancy Testing
Rent Assistance
Shelter
Substance Abuse Outpatient Treatment
Utility Assistance .
Volunteer Opportunities

Role Play 1:

Caller's request

I&R Specialist: That number is 898-5860.

Caller's response

I&R Specialist: Yes, they are taking applications until December 12. You need to bring Social Security cards for everyone in the family, picture ID, and proof of residents, which could be a bill sent to your address within the last 30 days. Do you need their address?

Caller's response and call ends

Role Play 1:

Caller's request: I want to sign up for the Salvation Army Christmas Program, what is that number?

I&R Specialist:

Caller's response: Is there a cut off date for that program?

I&R Specialist:

Caller's response: No, I know where it is. Thanks for the information.

Role Play 2 - Caller

Call requiring assessment, evaluation of referrals available based on information given, and giving the correct information to the caller

Caller: I went to the emergency room with a toothache and the doctor prescribed an antibiotic, but I don't have any money to get the prescription filled, can you help me.

I&R Specialists Response

Caller: I live at 3164 Redick Ave. My zip code is 68111.

I&R Specialists Response

Caller: I will give these a try. Thanks

Call ends

Role Play 2 – I&R Specialist

Call requiring assessment, evaluation of referrals available based on information given, and giving the correct information to the caller

I&R Specialist: I am going to need some information in order to find a program to help you. What is your address and zip code?

Caller's response

I&R Specialist: There are a couple of programs in North Omaha you can try. GEMS is a program through Family Service North. Their number is 451-6244. You will have to call first to see if they have any funds right now.

You could also try Together, Inc. Together, Inc. has an answering machine only, so you might want to go down there. They are located at 1616 Cass St, their phone number is 451-7014. Take the prescription with you.

Do you belong to a church? Sometimes your church can help in situations like this.

Caller's response and call ends

Role Play 3 – Remaining Impartial – Caller

Caller: I need to have a number for domestic abuse counseling.

I&R Specialist's response

Caller: This is for me. My husband is getting more and more violent. I really need to talk to someone.

I&R Specialist's response

Caller: No I am fine. He hasn't hit me since last week, when he gave me a black eye, but I am fine now.

I&R Specialist's response

Caller: I've thought about it, but I would have no way to support myself. I have been a stay at home mom. I got married right out of high school, so I have never worked. I don't know what I would do to support myself and the kids. My family won't even have anything to do with me because of him.

I&R Specialist's response

Caller: They might be, I don't know. I really don't want to leave, I know he loves me and I love him.

I&R Specialist's response

Caller: Thanks for the information.

Role Play 3 – Remaining Impartial – I&R Specialist

I&R Specialist: There are a number of places in town that do domestic abuse counseling. Is this for yourself or someone else?

Caller's response

I&R Specialist: Are you in any danger right now? Are you hurt?

Caller's response

I&R Specialist: You might want to call the YWCA. They have a Domestic Violence and Sexual Assault Program, they also work with the batterer and if necessary can help you and your children get into a shelter. Their number is XXXX. There is also a program through Catholic Charities. They also have shelter services available. Their number is XXXX. Shelters don't have published addresses, so if you decide to go to a shelter your husband would not be able to find you. Both programs also counsel children who have been living in domestic abuse situations. Have you ever considered leaving?

Caller's response

I&R Specialist: Do you think your family would be more supportive if you left him?

Caller's response

I&R Specialist: Well you have made a good decision to seek counseling. It will benefit you and your children, if you decide to involve them. It will give you some support if you decide need to leave. If your husband assaults you again, you can call the police and press charges. That would give you time to get to a shelter where you and your children would be safe. There is an emergency domestic abuse hotline number. Let me give you that in case you need it. The most important thing is the safety of you and your children. The number is XXXX. If you need any other information, give us a call.

Caller's response and call ends

This caller was not ready to leave the situation, but wanted counseling. If the I&R Specialist had been less impartial and had insisted that she leave or call the police, she might have hung up. The agenda should be that of the caller. When and if she decides to leave the situation she has the numbers she needs or she knows she can get them by calling the I&R Specialist back. She also has learned something about the possibilities open to her.

If she was in immediate danger or was injured the I&R Specialist could have alerted the authorities. The caller's safety is of primary concern.

Evaluation of Training and Trainer

We would appreciate your help to assist us improve our session by evaluating the Session using the following scale 1=Strongly Disagree and 5= Strongly Agree.

	Strongly Disagree				Strongly Agree
The session covered information that was relevant to the topic.	1	2	3	4	5
I had an opportunity to participate in the session.	1	2	3	4	5
I felt comfortable making comments or asking questions	1	2	3	4	5
Information was presented in a ways that I could understand.	1	2	3	4	5
The session covered the right amount of information.	1	2	3	4	5

Which topic(s) was left out that you wanted to hear about?

Overall, this session achieved its stated goals	1	2	3	4	5
The trainer was well prepared and organized.	1	2	3	4	5
The materials were presented in a simulating and interesting manner.	1	2	3	4	5

Comments: _____
