MAINTAINING
AN
INFORMATION AND REFERRAL
(I & R)
SERVICE

Presented by

NEBHANDS
A Faith Based Community Initiative

and

United Way of the Midlands

December 2003

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Course Overview

How to Maintain an I&R

This two (2) hour course discusses the uses of an I&R database, what steps are needed to maintain an I&R Services, and looks at ways to maintain and expand services in the community.

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A Brief Outline

Time	Outline
5 Minutes	I. Introduction A. Trainers B. Housekeeping C. Learning goals and expectations
5 Minutes	Exercise
10 Minutes	II. Database users A. Your own organization B. Other community agencies C. Individuals and families needing assistance D. Funders and policy makers
10 Minutes	III. Other uses for the database A. Directories B. Brochures C. Lists
30 Minutes	IV. Keeping the database current A. Formal updating B. Informal updating
15 Minutes	V. Professional development opportunities A. Conferences and seminars B. Online training
30 Minutes	VI. Maintaining and developing community services A. Who to bring to the table B. A Mission Statement and an action plan: short- and long-term goals C. Effective meetings D. The meeting: E. Barriers to an effective collaboration F. Evaluate
5 Minutes	VII. Conclusion A. Learning goals and expectations B. Evaluation C. Thank you

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Trainer's Instructions

This Manual is organized so that a trainer can conduct the Maintaining an I&R Training with as much ease as possible. Each section listed in the index is tabbed in the Maintaining and I&R Training Manual. Inside the front cover of the manual is the Power Point presentation on disk.

There is a list of supplies and equipment needed to conduct the training.

The Handout Section is indexed and contains original documents that will be discussed during the training, a copy of the Power Point Presentation, and the Training Evaluation, all of which can be copied for participants. There is also a Brief Outline if the Trainer should want to hand that out as well.

The Trainer's Outline is more detailed than the Brief Outline. On the left side of the Trainer's Outline are the resources needed for each section of the Training Outline. On the right side is the outline itself.

Italic notations in the Trainer's Outline are dialog suggestions for the Trainer to use to introduce exercises, discussion or to further explain the point being made.

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Trainer's Outline

Resources	Notes

I.   Introduction:
    A. Trainers
    B. Housekeeping
    C. Learning goals and expectations
       1. The uses of an I&R database
       2. Steps needed to maintain I & R services
       3. Ways to expand services in the community.

Exercise: Why Have an I and R Service?
Flip chart, markers

A database is like a telephone book. It is obsolete the minute it is printed.   There are changes. In location, phone number and in the people in residence. Similar to a family human service organizations move, change their phone number and change their services. If you don't keep your database updated and accurate the information you are providing is worthless. The purpose for the existence of an I&R service, to reduce the number of calls a client has to make to get the service they need, is lost.

Power Point Presentation
Flip chart and markers

Who does a database serves?

II. Database users
    A. Your own organization
    B. Other community agencies
    C. Individuals and families needing assistance
    D. Funders and policy makers

What else can be done with a database?
Flip Chart

III.   Other database uses
    A. Directories
       1. Community directories: printed or otherwise
          a. Copyright
             i. Collect and assemble pre-existing data
             ii. Select and arrange data
             iii. Originality - you can not just copy someone elses directory
       2. Specialized directories, e.g., a directory in Spanish for Spanish speakers

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Resources	Notes

B. Pamphlets/brochures that can be distributed to agencies for their clients

C. Mailing Lists

Your database is useless if not kept current. What information do you think you need to collect?
Flip chart
Lets look at some examples of database entries and see what information may be useful.
Review handouts

IV. Keeping the database current
  A. Formal updating
    1. Mailings
    2. Email/FAXes
    3. Phone Calls
  B. Informal updating
    1. Newspapers
    2. Professional magazines and newletters
    3. Agencies
    4. Interagency meetings

It is important to have staff trained in different aspects of I&R, including how to handle domestic abuse calls, suicide calls, medical emergency calls and protective service calls.

V. Professional development opportunities
  A. Conferences and seminars
  B. Online training
  C. Interagency meetings

VII. Maintaining and developing community services a collaborative effort

Flip Chart: *Why is collaborating important?*
  Can accomplish things an individual or individual agency could not
  Cost effective, avoid duplication of services
  Better problem solving
  Build community involvement and support
  Increase awareness and understanding

A. Who to bring to the table
  1. Agencies and organizations with similar agendas
  2. Government agencies with similar agendas
  3. Local businesses and private citizens
B. Mission Statement and an action plan: short- and long-term goals

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C. Effective meetings
1. Accomplishes goals
2. Members communicate freely
3. Disagreements are discussed and resolved
4. Issues are decided by consensus, everyone "buys in" or at least agree to "try it".

D. The meeting:
1. Where and when?
    The time, place and frequency of meetings should be scheduled to maintain consistency and continue progress, but not to be too inconvenient to members.
2. A *neutral* meeting facilitator
    Who is going to help determine:
    a. *The agenda*
    b. *Who is going to do what when*
    c. *How are problems resolved and decisions made*
3. Recording the meeting – clearly and concisely

E. Barriers to an effective collaboration
1. Necessary partners are excluded
2. Partners are not included in the initial planning
3. The goals of the collaborative are not consistent with the mission of the individual or agency
4. Partners are unwilling to work together or understand the constraints of the others
5. The agency leadership is not supportive of the collaborative effort

F. Evaluate your progress, make changes where necessary, keep the goal in mind.

VIII. *Conclusion*:
A. *Review the learning goals and expectations:*
1. *The uses of an I&R database*
2. *Steps needed to maintain I & R services*
3. *Ways to maintain and expand services in the community.*

Evaluation of Training and Trainer   B. *Ask participants to complete and hand in Evaluation*

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Supplies Needed

1. Flip chart and stand
2. Magic Markers
3. Masking Tape
4. Power Point Presentation Disk
5. Lap top computer, projector and screen for Power Point presentation. If this is not available, you can make transparencies of the Power Point presentation and use an overhead projector.
6. Copies of Learning Objectives in sufficient number for number of attendees
7. Handouts of Power Point presentation in sufficient number for number of attendees
8. Copies of sample Database Records and Agency Database Form printouts in sufficient number for number of attendees
9. Evaluations in sufficient number for number of attendees

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Bibliography

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

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

United Way of the Midlands' Policy and Procedure Manual, Omaha, NE

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Handouts

H1 - Learning Objectives

H2 - Sample Database Records

H3 - Agency Database Form

H4 - Power Point: Maintaining an I&R

H5 - Exercise

H6 - Evaluation

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Learning Objectives

Participants will:

- Understand the purpose and use of an Information and Referral Database
- Be able to name two steps to maintaining a database
- Be able to describe one way to expand services in their community

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American Red Cross Pantry
2912 S 80th Ave   *Program#:*   UWML0592AA
Omaha, NE 68124

Last Formal Update: 09/12/2003

Telephones: (402) 343-7700
                (402) 397-5916   Fax
email:
Internet Address: www.redcrossomaha.org
Mailing Address:
                AMERICAN RED CROSS
                EMERGENCY FOOD PANTRY
                2912 S 80TH AVE
                OMAHA, NE 68124
Operating Agency: American Red Cross - Heartland Chapter
Person in Charge:
Title:
  Also Known As:
  Printed Directory Name:
  Hours: 8:00 a.m. to 11:00 and 1:00 - 4:15 p.m., Monday - Friday
  Languages: Spanish
  Fees: None
  Eligibility Requirements: People in need of food assistance
  Intake Procedure: Call for information or walk in

  Service Area Description: Douglas, Sarpy, Cass, Washington Counties in Nebraska
  Geo Service Area: Nebraska
  (Used for Searches) Does Not Service Entire Area

  [X]   In directory?   [ ]   Nebraska
                                                   [ ]   National

  [X]   Cass County, NE
  [ ]   Dodge County, NE

  Support Grp Category:

Keywords		Taxonomy Codes		
Description	*All Areas*	*Code*	*Description*	*All Areas*

About the Program:
  1. Food Pantry, one sack of groceries, once every three months
  2. Photo ID, Social Security Card for everyone in the household required,
     and a piece of mail to verify residency
  3. Emergency food after hours; call and make arrangements

About the Program for Printed Directory:

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St Martin de Porres
2417 Burdette St   *Program#:*   UWML1022AA
Omaha, NE 68120
                                                      Last Formal Update: 09/05/2003

Telephones: (402) 341-4004
                (402) 341-1130   Fax
email:
Internet Address: www.ccomaha.com
Mailing Address:
                ST MARTIN DE PORRES
                P O BOX 20055
                OMAHA, NE 68120-0055
Operating Agency: Catholic Charities
Person in Charge: Viola Jackson-Haag
Title: Team Leader
    Also Known As:
    Printed Directory Name:
    Hours: 8:00 a.m. - 4:30 p.m., Monday - Friday; Pantry hours: 10:00 a.m. - 12:00 p.m., Monday, Tuesday,
              Thursday, and Friday
    Languages:
    Fees: None
    Eligibility Requirements: No restrictions
    Intake Procedure: Call for information
    Service Area Description: Omaha Metropolitan Area
    Geo Service Area: National
    (Used for Searches)   Does Not Service Entire Area
    [X]   In directory?   [ ]   Nebraska
                                                [ ]   National
    [ ]   Cass County, NE
    [ ]   Dodge County, NE
    Support Grp Category:

Keywords		Taxonomy Codes		
Description	*All Areas*	*Code*	*Description*	*All Areas*
Food Pantries		TF-300.150-	Christmas Programs	
Holiday Assistance		FT-300. -	Family Law	
Index		BD-180.200-	Food Pantries	
Legal Services		PH-140.500-	Mentoring Programs	
Mentoring		PH-500. -	Mutual Support Groups	
Multiple Service Agencies	Yes			
Support Groups				

About the Program:
    1. Pantry Program requires the following identification in order to receive a pantry:
        a. Social Security cards for everyone in the household
        b. Proof of residence
        c. Picture I.D.
        d. Once in six months. Medicare clients are eligible every four months

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St Martin de Porres

    Notes: St Martin's will need a written note from the client if the client is
        sending a proxy person to get the pantry

2. Christmas Family-To-Family Program clients must meet compliance of fulfilling
   four activities plus writing a letter.
   a. Write a letter to an elected official or public servant voicing a concern or   issue.
   b. Volunteer 3 hours of service at a non-profit agency, or
   c. Attend community forums or meetings (must last at least 1 hour)
   d. Participate in community activity projects
3. Vision of Hope for women of lower income who want to make positive changes
   in their lives
   a. Weekly support group
   b. Goal setting
   c. Education workshops
   d. Mentoring by women from business or professional community
4. Community Forums
5. Legal counseling through Nebraska Appleseed on civil/family matters, first and
   third Thursday afternoons of the month, by appointment only

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Salvation Army Pantry
3612 Cuming St   *Program#:* UWML0599AA
Omaha, NE 68131

Last Formal Update: 07/30/2002

Telephones: (402) 898-5860

Fax

email: paula_hite-garcia@usc.salvationarmy.org
Internet Address: www.salvationarmyomaha.com
Mailing Address:

SALVATION ARMY
RENAISSANCE CENTER
3612 CUMING ST
OMAHA, NE 68131

Operating Agency: Salvation Army of Omaha
Person in Charge: Paula Hite-Garcia
Title: Program Director
  Also Known As:
  Printed Directory Name:
  Hours: 9:00 a.m. - 11:00 a.m. and 1:00 p.m. - 3:00 p.m.; Monday, Tuesday, Wednesday, & Friday
  Languages:
  Fees: None
  Eligibility Requirements: Those in need of food and not receiving food stamps
  Intake Procedure: Call for information

  Service Area Description: Douglas County, Nebraska
  Geo Service Area: Douglas County
  (Used for Searches)   Services Entire Area

  [X]   In directory?   [ ]   Nebraska
                                               [ ]   National

  [ ]   Cass County, NE
  [ ]   Dodge County, NE

  Support Grp Category:

Keywords	All	Taxonomy Codes		All
Description	*Areas*	*Code*	*Description*	*Areas*
Base Needs	Yes	BD-180.200-	Food Pantries	
Food Pantries				
Index				

About the Program:
  1. Social Security Cards for everyone in family
  2. Proof of residence
  3. No food stamp recipients
  4. Once every three months

About the Program for Printed Directory:

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Nebraska 2-1-1 Community Directory/Database

Return to: Jennifer Curran, 2-1-1 Data Resource and Outreach Manager, 1805 Harney St. Omaha, NE 68102
Fax: (402) 522-7991

Operating Agency:_____

Agency Type: (check one) ☐Non-profit (501)©(3) ☐Other Non-profit ☐Government ☐For Profit

Executive Director:_____

Agency Address:_____

City:_____ **State:**_____ **Zip:**_____

Agency Phone:_____ **Fax:**_____

800#:_____ **TDD/TTY:**_____

E-mail Address:_____ **Internet Address:**_____

Program Name:_____

Program Address:_____

City:_____ **State:**_____ **Zip:**_____

Program Phone:_____ **Fax:**_____

800#:_____ **TDD/TTY:**_____

E-mail Address:_____ **Internet Address:**_____

Languages Spoken:_____

Days/Hours:_____

After Hours:_____

Geographic Area Served:_____

Eligibility:_____

Intake: (check) ☐Walk-in ☐Referral ☐Appointment ☐Other: _____

Fees: Yes or No _____   If yes, please specify: (check) ☐Sliding Fee   ☐Flat Fee

Barriers of building access: Yes or No _____   If yes, please specify: _____

Check if applicable: ☐Medicare   ☐Medicaid   ☐Other: _____

Does your agency or programs/services utilize volunteers?   Yes or No _____

If yes, contact person:_____

Service Description: _____

_____

_____

_____

I hereby authorize the release of this information for publication (printed directories, Internet access and specialized reports).

    Authorized by: **Signature:**_____

                   Name/Title:_____

                   Phone:_____ **Date:**_____

    ****Brochures describing programs/services may be included with this form.****

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The Database Serves:

- Your own agency

- Other agencies in the community

- Individuals and families needing assistance

- Funders and policy makers

Other Uses for Your Database

- Directory

- Pamphlets and brochures

- Lists

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H-4

Keeping the Database Current

- Formal updates:
  - Mailings

  - Emails or FAXes

  - Phone calls

Keeping the Database Current

- Informal Updates
  - Newpapers

  - Professional magazines and newsletters

  - Agencies

  - Interagency meetings

Professional Development

- Conferences and seminars

- Online training

- Interagency meetings

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H-4

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

Mission Statement

- Short-term goals
- Long-term goals

Effective Meetings

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

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H-4

The Meeting

- Where and when
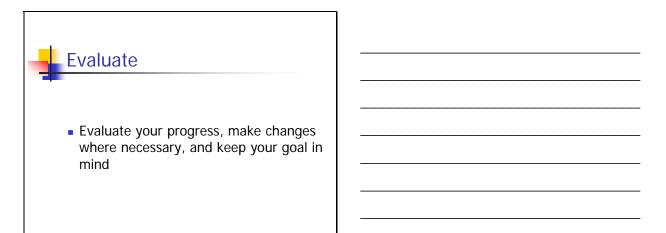
- A neutral facilitator

- Recorded minutes

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

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

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H-4

Evaluate

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

_____

_____

_____

_____

_____

_____

_____

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H-4

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:_____

_____

_____

_____

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H-5

Exercise: Why Have an Information and Referral (I&R) Service?

Objective: To help participants see why having an I&R is important

Materials: Flip chart and markers

Procedure:

Ask the group the following questions and write the responses on a flip chart
1. How many of you live at the same address, have the same phone number, and the same number of people residing in your house as 10 years ago?
2. How many of you live at the same address, have the same phone number and the same number of people residing in your house as 5 years ago?
3. How many of you have changed addresses, phone numbers or had the number of people residing in your house change?

Discussion Questions
1. Do you have an I&R service in your community?
2. What would be the benefits of having an I&R service in your community?
3. What would be the pitfalls of having an I&R service in your community?
4. How would your community be different if you had an I&R service?

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