ROGER HOWARD: I have the green light.

I'm on.

Good morning, everybody.

It's great to be here and get things going for this training.

Our initial session is on the effective provision of information and referral services.

Excuse me, like a lot of people, I'm just getting over respiratory stuff, so I may be turning around to clear my throat a lot today, and I apologize for that.

We're kind of doing a two‑part presentation today.

Darrel is going to start out, and he's going to talk about information and referral from basically your human approach, customer service, interpersonal skills, those sorts of things.

Then as he's done, as Amina said, we'll take a short break, and when we come back I'll be talking kind of a nuts and bolts of operating an effective information and referral service.

Before Darrel gets going, we have these questions, you know, why is information and referral a core service? Well, first, it's a primary means of promoting consumer empowerment.

I know it sounds trite, but knowledge is power.

And the more folks know, the better off they are, the more effective they can be in running their own life.

Also as you can see here, it supports an individual's capacity for self‑reliance and self‑determination.

People have the knowledge and hopefully can gain the skills to act on their own behalf.

The American Alliance ‑‑ I'm sorry.

DARREL CHRISTENSEN: I know some people are looking for which handout we're talking about.

It's in the Day 1 packet.

Mine was in Day 2.

DARREL CHRISTENSEN: Day 2? Tim?

 The title on the front page of it is Effective Information and Referral Services That Are Responsive to Community Needs.

It's listed as March 26 from 10:00 to noon, and it should be on the left‑hand side of your Day 1 packet.

So again, Effective Information and Referral Services That Are Responsive to Community Needs is what you're looking for.

Sorry.

ROGER HOWARD: No, thank you very much.

Give folks a second to kind of shuffle through the big pile of papers we have.

In addition to supporting an individual's capacity for self‑reliance and self‑determination, the American ‑‑ I'm sorry, the Alliance of Information and Referral Systems, AIRS, next on this slide, says information and referral provides education, affirmation, collaborative planning, and problem‑solving, and those are all really important, and I'm sure in your work you've experienced all those things in providing information and referral.

Lastly, information and referral provides a road map for people to navigate the complex and confusing system, and we all know what I'm talking about here, you know, the definition of disability is different for social security than it is for the Americans With Disabilities Act, different from the Veterans Administration, you know.

And it's important sometimes for folks to understand those differences so that they can navigate the service system.

So with that kind of basic groundwork being laid, I'll turn it over to Darrel to do the first half of this presentation on the human approach to information and referral.

DARREL CHRISTENSEN: All right.

Thanks, Rog.

We are looking at the human approach, the first point of entry.

What I want everybody to understand from the outset about information and referral, this is much like the city of St.

Louis, it's the gateway to your agency.

If you can visualize I & R as the arch in St.

Louis, it's the gateway to your agency.

It is the first point of contact that people have.

I know whether you're in I & R or IL skills or if you're an executive director or president, you need to understand that that position is critical.

It is the entry point of all the other services that your agency provides.

And if you as a director don't put this service as a priority, you're missing the boat.

You need to treat that information and referral person as the quintessential door to the rest of your agency.

You really need to put the focus there.

And I know that in some centers, you know, you might have an intern that says, well, we need somebody to answer the phones.

Somebody please answer the phones.

We have an information and referral question here.

Or you have maybe a volunteer answering the phones.

You need to have somebody that provides good service as an entry, because if you think about it conversely, if you were calling an agency and you get the first person on the phone who is competent, who is professional, knowledgeable, you have a good impression of that agency, don't you? But if you have someone who doesn't know their head from a hole in the ground, you're just wondering what kind of agency is this and do I want to refer my consumer to them?

 So the programs and services offered by their CIL are the other three core programs.

They are the independent living skills, they are advocacy, and it is peer support.

Those are the core services of any Center for Independent Living.

If your information and referral person isn't answering appropriately, you're not going to even get your caller to these other programs.

Consumers contact I & R specialists for resources offered within the community.

Now, what we like to think of is if you don't document something, it didn't happen.

So what some centers have used is what we call a little ticksheet, you might have the topics areas off the 704 Report and have a little cheat sheet next to everybody's phone, two, three, four, five.

One, two, three, four, five.

And it's an easy way for those short calls to be counted so you don't have to have a three‑minute call, I need the number to the MS Society, and take 15 minutes to document that three‑minute call.

But you can have a little ticksheet, but it still counts.

I tell staff, give yourself credit at the end of the month for all that you do.

If my staff is giving me a program report at the end of the month, I tell them brag about what you're doing.

Tell me about what you're doing and all of the services that you provided.

And if it's my information and referral person, then count appropriately the calls and topical areas that you provided to your callers.

Brag about it.

Give me those numbers.

Don't puff them up, but give me accurate numbers.

Give yourself credit for what you're doing.

And by having the resources in the community, in these areas such as housing, employment, financial assistance, healthcare, those tend to be the top four categories from people that we get calls on.

For ABIL here in Phoenix, our one information and referral person, our full‑time person, gets close to 300 calls per month that she fills by herself.

Each month, we have recorded, about a third of those calls are housing related.

So by being able to document the topics, we can then go on to advocacy, we can see a trend, and we can take community action.

But this way, we can make sure we know what's happening out there, what are the topics of great concern for our folks that are calling us.

As far as customer service, for an I & R specialist, it's providing relevant information.

They must possess not only knowledge but customer service skills as well.

And I'm telling you this is one of the key points of this as well.

Customer service is paramount.

When I'm hiring new staff, I want to make sure that they not only have the knowledge, but they have customer service skills, because again, thinking in terms of you being a caller to another agency, you want to have someone who provides you with good customer service, right? It makes sense.

What does that mean? It means someone who has, you know, a positive, energetic voice, someone who is understanding, who is caring, someone who really can connect with someone.

You don't want to have a robot who is answering the call, hello, how can I help you? Do you need a new apartment that's accessible? You want somebody who is like, hey, Carmen, how can I help you today? You know, are you concerned about housing? Let me see, tell me about your housing issues and what are you looking for?

The bathroom doorway is too narrow; I can't get through there.

DARREL CHRISTENSEN: We need bathrooms with a doorway she can get her wheelchair through.

I have a few places in mind that I have right next to my phone that I can give you some phone numbers to call, and I know that they have some openings, that are accessible to meet your needs.

You know.

So you really are making that connection.

So it's not only the knowledge that you have, which you do have to have knowledge, but you also have to have customer service.

Know also what you can and cannot do for your consumer.

And again, directors, it's okay if your staff has limits.

You know, one of the most difficult things for our information and referral person is to say to folks, there are waiting lists for all 12 housing authorities in the valley.

We don't have any openings that we know of through any of the 12, through Tempe, Mesa, Phoenix, the other cities throughout the valley, they are not even taking new applications.

I don't want my staff puffing things up and saying, oh, yeah, we have tons of openings for accessible affordable housing, when we don't.

So know what you can do and know what you can't do.

And directors, empower your staff to be able to have that freedom to let folks know and not make false promises.

Right? You would much rather have an agency tell you the truth that, you know what, there's no openings for you, the housing authorities, you know, Christina has told me in Colorado Springs that there's no openings at the housing authority there.

Okay, that's information that's helpful.

She might have some other resources or other ideas, maybe room‑share, some other types of alternatives, but the housing authority doesn't have anything.

I would much rather her be honest with me and tell me what she can provide and what she can't provide, rather than making something up and saying, oh, yeah, Darrel, we have plenty of housing available, oh, yeah.

You know, and I make the phone calls and it's like, what the heck was Christina talking about? There's no openings.

They haven't even taken an application since '09, right?

 Tell me what you cannot do, rather than making something up that you can do it and you can't come through.

So know what you can do.

I'm not saying that you have this out.

Be creative about having some other solutions, but don't make false promises.

Does that make sense? Good.

Know your boundaries and parameters, and it's okay.

It's okay.

And let them down easy.

Boy, I've heard it from my staff, it's like, that's the hardest, most challenging part of my job is to say I don't have an answer for you.

You know, my staff says that's by far, that's the hardest part.

They can take the verbal abuse, you know, pretty ‑‑ not well, nobody likes to get yelled at, you know, you get sworn at, nobody likes that, but the harder part is to really not have a good answer for someone.

That's hard.

So let them down easy.

Your listening skills, Amina had a great little exercise here about listening skills.

Listen to your consumers' issues.

So often a person might call and their initial topic might be about housing, but if you give them a couple minutes to tell their story, it's not housing at all.

It's about financial management.

It might be about some mental health issues.

Their core issue that they didn't even realize might be that financial management piece, that they're wildly spending, and by the 20th of the month they've exhausted all funds.

That may be the core issue.

So you might suggest that they come in and attend a financial management independent living workshop.

Hmm, that's nothing really to do about housing, about securing an apartment, but that might be the core basis from which they can springboard back to getting housing.

Let the consumer speak without interruptions.

This is for any caller or walk‑in or e‑mailer.

Well, you can't really cut somebody off on e‑mail.

But let them finish their thoughts.

For folks that might have some speech impairments, give them the dignity.

Don't say I'm going to save them the energy and finish the sentence for you.

My ex‑wife used to do that all the time, finish my sentences for me.

And I would say wait a minute, that wasn't even close to what I was going to say.

So women and guys, let people finish their thoughts.

 And be nonbiased about their suggestions.

You need to focus in on their values, their beliefs and their perspectives.

Help them problem solve but don't say ‑‑ don't tell them what you necessarily would do.

One of the easiest questions to answer is, well, Darrel, if you were in my shoes, what would you do? You've had 15 years of experience, 25 years of experience in independent living, so with that, what would you do if you were me? I won't answer that question and you better not either because here is what can happen very easily.

If I tell Lupita what to do, she can come out of it with two things.

One, she can say, well, it went so well that that suggestion went so well, because Darrel is such a genius, he's such a brilliant man.

(laughter)

He is like Richard, he's a God, he is so knowledgeable.

That takes the responsibility of the work and the effort that she's put in off her shoulders and puts it back on mine.

Conversely, if I tell Lupita what to do and that suggestion doesn't go well, well, it's that Darrel who is an idiot, he doesn't know what he's talking about, you know, he told me what to do and it didn't turn out at all, right? It's all his fault.

And it takes total responsibility off her shoulders either way.

So you just answer it by saying it doesn't matter what I would do, but let's problem solve of what you think might be your best options, and help them work through that problem‑solving process.

That way they take more ownership.

Okay? Communication skills.

Relay information clearly and concisely to consumers over the phone.

That's self‑explanatory.

Have good written skills for consumers who choose to communicate by e‑mail, TTY, relay service ‑‑ not relay services, but with good written skills.

Good communication skills verbally and written.

When face to face with a consumer, show proper body language that's consistent with the matter at hand.

I hope that most people here know that 70 to 90% of all communication is nonverbal.

Only, what's that, 10 to 30% are actually the words that we use.

The rest is nonverbal.

So if you're, you know, checking your phone and checking your watch, but really, Monica, I care deeply about your issue here.

(laughter)

Yeah, I want to help, I really do.

(laughter)

So tell me really what you're looking for again.

What did my body language say? Not so much.

It's somewhere else.

Okay? So really engage in that person.

And if you have, you know, a limited amount of time available before the next meeting, well, then, you need to plan your meeting accordingly.

If it's a drop‑in, maybe you only have 15 minutes before your next meeting, say, you know, let me get you started here with some information, and then maybe we can schedule an appointment when we can spend more time on this.

Or, your schedule may be flexible enough with that meeting that you can just devote that time to that customer, because after all, the customers are why our doors are open.

If it wasn't for our customers and providing good customer service, we don't have jobs, we don't have a center, we're not doing anything.

Or perhaps it's handing them off to another staff member who might be even more qualified than you to answer their questions, and who has the time maybe with that walk‑in.

But show them the proper body language with the task at hand.

De-escalation and crisis management, another key skill in this position.

Don't take matters personally.

You know, it's like, yeah, right, now that's easier written than done.

You know? Don't take matters personally.

You know, they're yelling at me, they're swearing at me, they're telling me it's my fault for, you know, X, Y and Z.

Try to be objective about it and don't take it personally.

That's the place to start, because otherwise if you do, the defenses will rise, voices are going to escalate and rise, and then it gets ugly.

They may be just very frustrated with the system.

That may be the crisis, right? They have gotten to you after having made ten other phone calls, they went to Carmen, they went to Doug, they went to Mike, Mike said to call Gary, and Gary said to call Darrel, by this time they're like, I'm really PO'ed at the whole situation, I'm frustrated.

Sometimes you just need to let them vent.

Don't take it personally.

And it says, let the person vent without interruptions.

Now, there's a fine line you have to run here, let them vent, let them get it out, but you don't necessarily have to take an hour and a half to let them vent.

Give them appropriate time for them to get it out of their system, but still not where they're repeating themselves over and over.

Amina and I had a caller a while back that had a tendency to repeat themselves four times, like we would understand it better the fourth time than we already did the first time, and finally Amina just had to finally say, you know, we've heard you, we understand.

Now how can we move forward?

 Make sure that the consumer knows that you're there to help.

Make sure that you know that you're there to help.

If you're having a really bad day at home or things are not going the greatest at home, really leave it at the door.

Leave your personal stuff at the door and focus on work, and then for sense of balance, leave work at work and live your personal life separate from that.

Just as an aside from that idea of balance, a number of years ago, I don't know where this came from, but I maybe saw a clip from the old Ed Sullivan Show where he had the guest who took the dinner plates and was spinning the dinner plates on the tall sticks, and I think of that in my sense of balance.

That each one of those dinner plates that was spinning was an aspect of my life, that I have my family life over here, my friends over here, my work on this dinner plate, my spiritual time, my workout time for physical activity, my man cave time, whatever my plates are, I want to make sure that I'm paying attention to each one of those to achieve balance, because if I'm over here and I'm working 80 hours a week but maybe my family is starting to wobble and I'm not paying attention to my family, that one is wobbling and not being attended to.

Come over and spend time with my family and not the 80 hours at work.

That's the way that you can achieve balance and provide better customer service.

That's the way that you can achieve better customer service and let folks know that when you're there, you're there for them.

Okay?

 Utilize other resources around you.

We'll talk throughout the next couple days about working as teams or within silos, and no matter if it's a center of four people or like Milwaukee or Phoenix where we have close to 100 staff, it doesn't matter, it's easier as a staff to work in silo, this is my job, this is all I need to focus on, I don't need to be concerned with the attendant care program or the housing department or integration, that's not my job, my job is information and referral.

That's easy to work in that silo.

But it's not as effective.

Spread yourself out and know about the other programs within your center.

Have at least a working knowledge about your attendant care program or home modification program so that you can make intelligent referrals to those programs without having to bounce people around within the office and staff to staff.

How frustrating and how embarrassing, how embarrassing is that when you have to refer people over to two or three other folks within the agency because they weren't the right people to talk to?

 Have a working knowledge.

It's more challenging, it's more difficult to work outside of those silos, but you're a lot more productive for that caller, for that consumer, a lot more productive.

Other resources might be community resources.

Don't be afraid to refer over to other agencies in the community.

It's okay to know that the center can't provide everything to everybody.

It's okay.

But information and referral, that gateway, at least you can send people the right place, at the right time, so they make one call to get their needs met.

They don't have to make that roundabout thing ten ways.

Then follow up at a later date.

We're fortunate.

A few years ago, we have a volunteer who takes the list of folks that we serve, the 300, and does follow‑up calls to make sure that their needs were met.

Do we provide good customer service? Do you need additional information? How can we help you further? We're using that through a volunteer.

Fabulous dedicated woman who has helped us for quite some time now, and she provides that good follow‑up.

And think again about if you order or if you purchase something from a business and they follow up and say, hey, you know, Doug, were you satisfied with our customer service? Did we meet your needs? Thanks, we appreciate that follow‑up.

It lets you know that they care.

It's just one more step in that customer service piece.

ROGER HOWARD: Darrel, we have a question back here.

DARREL CHRISTENSEN: Yes, go ahead, I'm sorry.

Right in front there.

ROGER HOWARD: That big button.

Sorry.

I have a question for you.

What if you have a consumer who you've already given them all the resources that are actually out there available and they say, well, I've already tried that, that didn't work for me, since I'm new, I'm still learning, but where do I go from there?

DARREL CHRISTENSEN: If you're ‑‑ you're saying you're new at the center?

Yes.

DARREL CHRISTENSEN: You might want to ask some co‑workers.

I'm the only one there.

DARREL CHRISTENSEN: You're the only one there.

But we do have another office in Tucson.

DARREL CHRISTENSEN: Okay, you're the branch office off Tucson.

Talk to your co‑workers, working with others, and brainstorm.

That's what team players do.

Don't be afraid to ask for some help.

Thank you.

DARREL CHRISTENSEN: Good question.

ROGER HOWARD: Sometimes it can be really helpful to go outside your agency, you know, in the course of your work, you've found people that are very knowledgeable, very helpful, and it's okay to say, okay, you've tried all the things that I know of, I'm going to check some stuff out, I'm going to get back to you.

Don't overpromise, as Darrel said, but I'm going to do my best to try and help deal with this situation, and you may get lucky and find somebody who says, oh, I know this one thing, and that could help.

There's another question.

You said about setting boundaries.

I'm kind of getting the impression that this consumer is looking for somebody who had things done for him.

You know what I mean?

DARREL CHRISTENSEN: They're at the wrong agency.

(laughter)

I said I really can't do that for you, I'm enabling you, and our agency is to able you, you know, to empower yourself.

DARREL CHRISTENSEN: And that's a good question about when you have people who feel that, you know, I have a disability, you owe me, that sense of entitlement, when you've had those calls.

No.

You're right.

We're here to enable not to ‑‑ or to empower, not enable.

To empower someone, not enable.

And say, you know, really it's in your best interests that I don't do this for you.

Also they maybe just ‑‑

DARREL CHRISTENSEN: Push the microphone.

AMINA DONNA KRUCK: Also they may just be lonely.

Sometimes people you have your favorite callers because they're lonely, so sometimes you have to address something that they're not saying, as Darrel said.

But all so often I get calls that I really can't help people, but I can validate that their need is real and I can invite them to call me back and I'll be their cheerleader while they still try to pursue what it is they're looking for, and people seem to really appreciate that, that I'm not just blowing them off, I'm being honest, I'm saying it's awful that there isn't that resource for them, and I invite them to call me back anytime and I'm happy to be their cheerleader.

And rarely do people call me back, but they leave feeling a lot better, and sometimes they do call me back, and there are some people I've cheer-led off and on for ten years, but not often, just when they need that.

DARREL CHRISTENSEN: Good.

Yeah?

Because, see ‑‑

DARREL CHRISTENSEN: I'm sorry, go ahead.

He does seem to come across as somebody who is lonely and wants somebody to talk to.

So in that case, do I just listen to him? But if he's not looking for a service?

DARREL CHRISTENSEN: Again, be careful about your time.

You know, you don't want to just be their person that they can tell their sob story and that they're lonely and need somebody to talk to each day.

Well, he's definitely a challenge because he's ‑‑ like I said, you know, I've been through other agencies and they know him on a first name basis.

(laughter)

You know what I mean?

DARREL CHRISTENSEN: Yeah, we've all had those.

Yeah, we've all had those.

But hang in there.

One more question?

I think one additional piece to that is skills training.

If they're not sure how to go about something, someone needs to try to work with them on how to advocate for themselves; and when they're problem‑solving, you're problem‑solving with them, they have to take some sort of action.

You can provide resources, but I know we have some that they don't have the social skills yet to ask in an appropriate manner.

DARREL CHRISTENSEN: And that's good because there are times when we can offer independent living workshops about the goal setting, or have goal setting workshops or to some social rec programs that can help folks interact appropriately, so those may be some other ancillary programs as well.

Let me just finish a couple more slides here.

ROGER HOWARD: She had her hand up.

Why don't we go ahead and break after this question, and then you can finish up when we get back.

DARREL CHRISTENSEN: Sounds good, okay.

It's not really a question.

It's more of a playing devil's advocate.

Occasionally you will find a consumer who calls and says, well, I've already called them and they told me no.

And I had this happen just the last week.

It's what you ask for and how you ask for it sometimes.

The particular caller needed to have assistance with transportation, and she called Travelers Aid and said I need to go to Ohio, and they said, sorry, we can't pay for a ticket to Ohio.

She did not ask them, well, can you pay for part of a ticket to Ohio or do you know someone who can assist me?

DARREL CHRISTENSEN: Yes, how we ask the questions are important as to what type of answers we're going to get from those questions.

Good point.

Okay.

So we are going to take a little break then, Tim.

How long? Ten minutes?

TIM FUCHS: 15.

DARREL CHRISTENSEN: A 15‑minute break, then we'll come back and continue.

Thank you.