

National Information & Referral Support Center

Resources for Specialist Training

Navigating the I&R Process: Communication Approaches and Examples

Opening/Greeting/Contact

A Community Resource Specialist's first words are a greeting; this greeting should be warm, friendly and encouraging (*The I&R Training Manual: The I&R Process*).

Good morning, this is (agency name) I&R. How can I help you?

Good evening, my name is Jane. Thanks for calling (agency name) I&A. How can I help you?

Thank you for calling (agency name). My name is Jane.

Asking Demographic Questions

The *Inform USA Standards*, Standard 1: Community Resource Specialists provide an explanation about why client information is being requested and when relevant demographic information is being collected. Additional data (i.e. being collected for funders or other stakeholders) should be collected towards the end of any conversation (Note that it will sometimes be required to differentiate between the inquirer and the person-in-need). The primary goal of data collection is to gather enough information about individuals to help them address and/or resolve their problems.

"Do you mind if I ask you some questions we ask all of our callers?"

"I'm happy to look for resources for you, while I'm doing that, can I go over some demographic questions that will help me find the right resources for you?"

(If a caller asks why they have to answer) "These are standard questions we ask all of our callers. They help me determine what resources will work for you, and help us learn more about the needs of our community."

"What is the age of the person requesting assistance?"

"Are you calling for yourself or on behalf of another person?"

"I am going to ask you a series of questions to assist me in providing you with the best service."

"Can you please verify your zip code so I may be able to find some resources or agencies that might be able to help you?"

Assessment/Clarification/Information and Referral Giving

"There is obviously a lot going on right now. What is the part that you really want to concentrate on first?"

"It seems there are a few concerns that you would like to address; however, we may not have time to work on all of these today. Which do you feel is the most important to start working on?"

"It seems you are looking for a simple answer. The answer may be simple but until we both understand more about your situation we can't know that. It can be frustrating but tell me some more about what brought you here today."

"You seem most concerned about... so let's start with that."

"Can you give me some more background/details?"

"Can you tell me more about..."

"Can you tell me more about the situation so I can provide you with the best possible resources?"

"I wonder if you could tell me a bit more about the situation you mentioned a few moments ago..."

"What made you decide to call today?"

"In order to find the right service to help you, I need to better understand..."

"What would you like to do about this situation?"

"What agencies have you already contacted regarding your situation or for resources that you are seeking?"

"Have you ever applied for this (program/service) before?"

"Let me see if I understand you properly..."

"Let me confirm that I understand the issue..."

"Mr. Jones, let me clarify your request before we move on. You are requesting information on..."

"Mrs. Jones, I am going to search our system for information regarding (client's request)."

"I'll be glad to see what I can do. We have information about services in the community and I'd be happy to give you some referrals."

"I'm still checking that, I'll be right with you."

"Do you have a pen and paper to write down the information you requested?" "Do you have something to write with?"

"Mrs. Jones, the ABC Family Services provides individual and family counseling. Does that sound like the place you are looking for?"

"There are organizations that provide household chore services for older adults. Would you be interested in that kind of help?"

"Mr. Jones, the (name of agency/service) can sometimes help with this kind of problem."

"This agency offers the type of program that you are looking for."

"Just to let you know, that office is only open until 3p.m. on Thursdays."

"Would you like me to go over some details about the application process?"

*"Do you have a source of transportation to get to the (agency/program) that I'm going to refer you to?"
"Do you need help with transportation?"*

(warm transfer) "Would you like me to transfer you directly to the (agency/program) so that you can explain your situation and receive assistance?" "Let me give you their phone number first, for future reference."

Creative Problem Solving

When a referral is not possible, or services are not readily available (i.e., long waiting list), specialists should be honest with clients and can explore alternative solutions (problem solving).

"I'm not able to find resources for (rent, electric bill, etc.) in our database at this time. Can I look for resources for other bills you may have so that you could possibly rearrange how you'll budget your money this month?"

"I am sorry, but that service is only for people who are (eligibility criteria)."

"Unfortunately we do not have a service that meets the criteria you specified."

"I know this must be very frustrating for you but our information is not showing any services that can help you with this situation."

"What have you done in other difficult situations when you've felt really upset?"

"Do you have any friends or family who have helped you in the past or might have some ideas for you?"

"Have you thought about contacting your family for help with this?"

"Has anything like that happened to you before?" "Can you remember what worked for you the last time you went through something like this?" "How did you manage to cope back then?"

"Have you been able to manage so far, or have you asked others for help before now? This will help me know if there are resources you haven't tried yet."

"Can you remember what worked for you the last time this situation occurred?"

"Do you go to a local church? Would you be comfortable telling the (minister/pastor/etc.) about your situation and seeing whether a little bit of help could be arranged?"

"Is there anybody you know that you'd feel comfortable talking with?"

Closure

"Remember you can call us back again if you need more help. My name is Jane, thanks for calling (agency name)."

"Mr. Jones, I have provided you with the phone number for the (local) Senior Center. Is there anything else I can help you with?"

"Is there anything else I can help you with?"

"Is there anything else I can do for you?"

"What else can I do for you today?"

"Do you have any other questions for me?"

"What additional information do you need that would be helpful?"

"If you have any problems contacting these agencies, please feel free to call us back. Thank you for calling (agency name)."

“Thank you for calling (agency name). Please call us back if the referral doesn’t work out or if you need any other help in the future.”

Follow Up

According to the *Inform USA Standards* (Standard 4), follow-up is conducted to benefit individuals and confirm whether or not their needs have been met. Specialists should request client permission for follow up.

“Would it be ok if we follow-up with you in a few days to see if the referrals I’m about to give you today were helpful?”

“Is it ok with we check back with you (in a few days/in a week) to see how the referrals are working out for you?”

“Is it ok if I call you in a couple of days to make sure everything is going well?”

“If someone else answers the phone, is it ok to ask if you are there?”

“Would you mind if someone from our agency calls you next week to check with you about the service you received?”

“Good afternoon. My name is Jane and I’m calling from (agency name). You called last week asking for information about... and you agreed to have someone call you back to see how things went and to ask about the service that you received. I’m calling to see how things worked out.”

“Was all the information that we gave you correct or was there anything we should check up on?”

Challenging/Difficult Calls

“I can understand how that would make you angry. I’m sorry if someone here gave you wrong information. Would you like me to look for something else?”

“I’m not sure who you spoke with, but right now I’d like to see if there’s something I can do to help. It sounds like you still haven’t been able to (get needed service, etc.).”

“I can appreciate your situation, but this is not something we’re able to do here.”

“You have a right to be frustrated, but in order for me to stay on the line with you, I need you to stop shouting.”

“I would be happy to continue the call, once you stop using that type of language.”

“We are here to help you Mr. Jones but your profanity is making that difficult.”

"We can talk about what is going on and how frustrating it is, but you can't continue to use offensive language."

"It seems you are not ready to change your behavior and are still using profanity so I am going to end this call."

"You've been calling quite a bit lately and it has been making it difficult for other people to get through. So I can talk with you for the next five minutes but you have to agree that this will be your last call today."

"I am sorry, I am going to disconnect now. You may call back if you can avoid using offensive language."

"It's difficult to talk when you're so angry, so I will end this call now. When you feel ready to discuss your situation, please call back."

"We seem to be going in circles, perhaps this is enough for today. I'm going to say good-bye."

(for manipulative callers) "We don't seem to be getting anywhere, so I think we should end this conversation."

"Since there is not a way that I&R can help you, I'm going to end this call. Thank you for calling."

"I am sorry that you do not find any of the options that I offered acceptable. I would be happy to continue to search for other options, but in order for me to continue, I need for you to not use that type of language anymore."

Empathetic Statements

"It sounds like you have been coping with a really rough situation."

"This sounds like a tough situation."

"I can only imagine how difficult this is for you."

"It sounds like you have been going through a lot."

"That sounds so frustrating."

"I can see how important this is to you."

"I can imagine this might feel..."

"This must be very frightening news to hear."

“You sound very angry/frustrated about...”

“That sounds difficult, let’s look and see what we can do to assist with...”

“It seems like that would be upsetting.”

“That sounds like a rough situation to be dealing with.”

“That must have been a pretty painful experience for you, you sound...”

“Seems like it would be difficult not to feel...”

“I can only imagine how overwhelming this feels right now.”

Sources

Inform USA Standards and Quality Indicators for Professional Information and Referral. Version 10.0, July 2024. <https://www.informusa.org/standards>

I&R Training Manual. Volume 2: Community Resource Specialists.
<https://www.informusa.org/products/training-manuals>

Eldercare Locator SoftSkills Call Flow

I&R Review Sheet, New York City, November 2008

AIRS I&R Toolkit, AIRS Networker

CRS-A/D Training Curriculum, I&R Support Center, Advancing States

Managing Difficult Calls: Looking In The Mirror. John Plonski, IMAlive.org National Hopeline Network. (AIRS 2022 Conference Envision I&R)

Training Resources

[ADvancing States IQ](#): ADvancing States' online learning center with a variety of no-cost training courses designed to help strengthen participants' knowledge of the aging and disability networks. ADvancing States IQ includes coursework on the I&R/A process and communication techniques.

Training webinars for I&R/A professionals: The I&R Support Center hosts regular training webinars to provide professional development to specialists. Archived webinars can be accessed from [here](#).

Community Resource Specialist in Aging/Disabilities (CRS-A/D) Training: This training provides an overview of key competencies needed for aging and disability I&R/A professionals and provides preparation for the Inform USA Certification exam for I&R Specialists in Aging/Disabilities. Archived training is available on ADvancing States IQ.

The I&R Training Manual. The Training Manual is the foundation for training all I&R Specialists and Resource Specialists, and is a valuable aid to prepare existing staff for Inform USA Certification examinations. For more information, visit [here](#).

Inform USA I&R online training: includes a variety of courses for I&R specialists and online practice certification tests. Visit [here](#).