Technical Assistance Guide:

Operating a Local Information and Referral Center

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This *Technical Assistance Guide* is the first in a new series for NICHCY. We welcome your comments on this volume and encourage you to suggest future topics for the *Guide*. Please share your ideas with our staff by writing to the Editor.

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Preface

Welcome to the exciting world of information and referral in the disability field! You are embarking on an exciting mission during what has been called the Information Age, and you are part of that explosion.

This guide offers an overview of the many areas important to operating an information and referral (I&R) center and contains many "design and management" suggestions. You will also find it helpful to talk with other I&Rs, even if their focus is not disability-related. The principles of information and referral are the same, regardless of the subject matter. Disability organizations, parent centers, special interest associations, and the like can share their special experiences and helpful insights with you, and you can share yours with them.

Who This Guide Is For

This guide has been written for a specific audience — those of you who are operating, or who wish to operate, a "grassroots" information and referral center. We've made certain assumptions in writing this guide:

- that your staff consists of a fair number of volunteers, with only a few part-time or full-time employees;

- that your primary audience is individuals or groups within your local community or within a limited radius beyond your community (in other words, you are not, at present, providing information or referral to a national audience);

- that your funding does not extend to equipping your office with the latest and most sophisticated computers or other technology;

- that you may already know a good deal about operating an I&R, based on your experience to date, but are curious as to ways to improve, streamline, or expand your operation; and

- that you are looking for pragmatic, commonsense, nuts-and-bolts suggestions on how to run an effective I&R on what seems, more often than not, a shoestring and a lot of interest and dedication.

What's in This Guide

This guide explores, in basic terms:

- the function of information and referral centers in the disability field;

- the process of organizing an I&R;

- how to put together and organize a basic resource collection;

- the daily functioning of an I&R;

- staffing an I&R, including the role of information specialists;

- the nature of the information and referrals an I&R provides;

- the necessity of outreach;

- effective dissemination processes for timely responses to your audience; and

- the importance of evaluating your work.

To make it easier for you to locate information, we have divided this guide into the following chapters:

1 — The Basics
2 — Your Resource Collection
3 — Your Referral Network
4 — Staffing
5 — Outreach
6 — Responding to Requests
7 — Evaluation

What Is NOT in This Guide

There are several key issues that this guide does not explore. The first is funding — how to find it, how to secure it, how to expand it. Because this is a critical issue in the continuing life of your I&R, we have listed some resources on funding in the bibliography at the end of this guide. Another issue this guide does not discuss is how to manage a budget — again, an important issue, but one that is and must be driven by the specifics of your funding situation and the scope of your I&R's mission. We urge you to consult an attorney or an accountant regarding how to manage your I&R's finances and to talk with experienced managers within your community about how to set up and maintain a budget.

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THE BASICS

Basic Activities of an I&R Center

It's important to understand the basic activities of an I&R center. Essentially, information and referral centers:

- provide callers with information on specific subjects;
- refer callers to appropriate service agencies, organizations, and groups; and
- provide practical information on how to get help and services when needed.

There are two "rules of thumb" for the I&R provider:

> *Know a little about a lot of issues, and know a lot about whom to contact for more information or assistance.*

This tall order is accomplished by being actively involved in the field. I&Rs collect information from diverse sources in various subject areas, network with other agencies, and are proactive in letting people know that their services are available. They are staffed with dedicated people who do not claim to know all the answers, but who *do* understand the questions being asked and the concerns of those asking the questions. The staff also know what type of information will be useful in answering these questions and where to obtain that information.

Determining Your Audience's Needs

The people who will be using your I&R are your *customers* or *audience*. A clearinghouse is always customer-driven (or it should be). Thus, it's vitally important to know who your customers are, what they need, and what sort of information they will find helpful.

You may have a good idea of who will be calling you, and why, as well as the range of concerns they will express. And while you may be right, it's equally possible that your predictions about your audience may be wrong or incomplete. That is why it is critical to research the information needs of the people your I&R plans to serve. This is called conducting a *needs assessment*.

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When properly done, a needs assessment will give you crucial information on what type of I&R is needed, a clear understanding of what the issues are, and insight into local resources and networks. The needs assessment will also help you determine what kind, how much, and in what form information will be most useful to your customers. Additionally, the documentation from the needs assessment can be of future use in evaluating the I&R and in reporting to your funding source(s).

Space limitations do not permit a thorough discussion of the needs assessment process. However, needs assessment is an important activity, and a detailed understanding of the process would be very beneficial. The bibliography section of this guide lists resources you may consult for additional information. A brief overview of the basic steps to conducting a needs assessment is presented below.

Decide What You Want to Find Out and Select the Method for Gathering Information. You may be able to find pre-existing information describing your audience, but it is more likely that you will need to go out into the community and talk to people.

*Some Issues to Consider
During This Planning Phase*

> What do you want to know about your audience? Be specific.
>
> Will your questions be open-ended (meaning that people can respond in any way they choose, giving an answer of any length), in a multiple-choice format (meaning they'll choose their answer from a range of possible answers you suggest), or a mix of both?
>
> Will people respond verbally or in writing? If you want them to respond verbally, how will you record their answers?
>
> Will you have them respond individually or will you convene focus groups to discuss issues and concerns?

Select Your Informants. You can focus on a specific group of informants (such as parents or family members), choose to interview a large number of people in the community, and/or decide to hold a town meeting or community forum. The majority of people from whom you gather information should be selected from the population you plan to serve.

Conduct a Pilot Study. Before you go out into the community and begin surveying potential customers, it's VERY important to conduct a pilot study. The purpose of the pilot study is to find out if the questions you plan to ask and the way you plan to ask them (and record answers) are going to produce useful and meaningful results. Ask a few people to answer your questions and give you verbal feedback on how understandable those questions were. This will help you avoid conducting your entire needs assessment only to find out that no one understood Question 4 or that everyone understood Question 10 differently! Similarly, you may discover that there are questions you hadn't planned to ask that you should.

A pilot study, in short, can save you from making costly mistakes in your needs assessment.

Assign Responsibility for Conducting the Needs Assessment. People will need to be assigned roles and responsibilities in collecting information from the respondents you've selected. These individuals should have some experience in collecting and recording information in a systematic way. They will probably also need orientation to and training in the specifics of your questionnaire and in the methods you've chosen to collect and record answers.

Gather the Information. Check progress as the needs assessment is conducted to be sure that all steps are being properly followed and that the information you need is being collected. Encourage your data collectors to tell you immediately of any difficulties they encounter in gathering information. If you mailed out a questionnaire for people to complete and return, keep track of forms that haven't been returned, so that you can send "reminder" postcards or place telephone calls to encourage people to respond!

Analyze the Findings. Analyzing and reporting quantitative data and qualitative information are important parts of the needs assessment process. If you are not familiar with analysis, identify someone who is and ask for assistance. Individuals with the necessary research or statistical skills may be located at universities, community colleges, high schools, or consulting firms.

These steps are the basics of conducting a needs assessment. Because this is such a vital activity for an I&R, we encourage you to read some or all of the resources on needs assessment listed at the end of this guide.

Important!

To maintain accurate information about your audience, it is essential to continue many of these needs assessment activities. Staying current on the needs of your audience will help you plan what type of information to collect for and disseminate to them and what formats (e.g., large print, braille, audiocassette) they will find most useful.

Defining the Mission of Your I&R

Before you talk to people about your I&R, before you send out any notices, before you answer your first phone call, it is valuable to define your mission. Whatever the scope of the I&R, be clear about what you are providing and why. A mission statement — agreed upon by those of you who are forming or operating this center — is necessary. Begin by articulating your basic philosophy and your specific goals.

Clearly stating the mission of your I&R helps you organize your activities, train your staff, introduce your center to other organizations, and measure your effectiveness.

Setting Up Your I&R

There are many legal and logistical concerns to be addressed when opening and operating an I&R.

Legal Issues. If you have not already done so, it's a good idea to consult with a lawyer to develop an understanding of the legal concerns involved in your endeavor. For example:

- Are you going to operate as a nonprofit business (usually referred to as a 501-C3 business) or a business for profit? Will you incorporate? Find out what paperwork needs to be completed and filed in order to establish yourselves in keeping with your plans.

- What system of accounting is appropriate? Running an I&R requires money as well as a legally acceptable system for spending and keeping track of funds coming in and going out.

- What labor or other state or federal laws should you know about? A lawyer will be able to tell you about applicable labor laws and other legal requirements for operating your business.

Beyond the legal issues in setting up for operation, there are a host of logistical concerns as well. At a minimum, these include: obtaining office space and equipment, developing a resource collection, developing a referral network, and staffing.

Office Space and Equipment. Obviously, every I&R needs an office or a place from which to operate. If you are reading this guide, you probably have found a place your I&R calls home. Standard office equipment such as phones, typewriters, computers, and a duplicating machine (or access to one) may be already set up and in use. Additional items you may need to consider include:

- a fax machine,
- a text telephone (TT) or other device for those with hearing or speech impairments,
- a place to house a resource collection, and
- a place and system for getting out the mail.

The size of your office and the amount of equipment you need depend on the scope of your work and your budget. Regardless of the size of your operation, however, your facilities must be fully accessible to people with disabilities, and people should be able to contact you on TTs or electronically.

Resource Collection. You will need information for your staff to consult and materials to distribute to your customers. This is the information component of the I&R center. The resource collection may consist primarily of printed materials but may also include materials on audio or videocassette or in another format (e.g., computer disk, large print). Your collection may consist of:

- basic materials in multiple copies to be send out to customers,

- materials for staff use which may be copied as necessary, and

- materials which may not be copied but which are used by staff for research.

The materials you distribute may be written by the I&R staff, collected from other sources, or both. A basic rule is:

Never re-do what someone else has already done well, especially if they'll give it to you.

Issues associated with developing your resource collection are discussed in some detail in Chapter 2 of this guide.

Referral Network. You'll also need the names, addresses, and phone numbers of organizations, groups, individuals, offices, and other sources of additional information and assistance. A concise description of the services each organization, group, or other resource offers is necessary as well, since these are the groups that comprise your referral base — where you'll go when you need more information, and where you'll send (refer) your customers when they need specific information or assistance you do not provide. How to assemble and make use of this referral network is the subject of Chapter 3.

Staffing Your I&R

How many staff you have (including those who serve as volunteers) depends on the resources and goals of your I&R. The more you do, the more staff you'll need. Of immediate need are:

- at least one information specialist;
- someone to answer phones, write letters, and pay the bills;
- someone to develop materials; and
- someone to get out the mail.

These jobs may be done by the same person or several people working part-time or as volunteers. However, it is helpful to have at least two people on staff, so the office can remain open consistently throughout the day.

Ideally, your staff should reflect your audience, that is, the people who will be using your services. For example, if your audience is bilingual, then it would be very helpful to have a bilingual information specialist. If your audience reflects a variety of cultures, then staff should reflect this, too. Issues associated with staffing are discussed more fully in Chapter 4.

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YOUR RESOURCE COLLECTION

Your resource collection — the books, articles, journals, newsletters, and magazines you collect; the materials you yourself produce; and your files on various organizations — is vital to your ability to respond to your audience's needs. There's a lot of information out there, and you need to identify it, obtain it, organize it, and maintain it. Here are some suggestions for doing just that.

Developing Your Resource Collection

Defining What Type of Information You Need. The first step in developing a resource collection is to determine what types of materials you need. What you collect depends, in part, on the mission and scope of your I&R. Your needs assessment should provide information on what sort of resources to include in your collection. What are the subject areas you should cover? What questions do you anticipate your clients asking? What answer format will your audience find most useful? What alternative formats (e.g., audiocassette, large print, braille) are needed by customers with disabilities? Will you need to make information available electronically (e.g., accessible by computer through a bulletin board system or on disk)?

When collecting print resources, identify the topic areas you think are of primary importance and begin collecting basic materials in those categories. In all likelihood, key subject areas will include:

Audiovisuals
Early intervention
Employment
Financial information (including Social Security)
Housing
Laws and policy, regulations, and interpretations
Medical and other health care information
Multicultural issues
Research
Respite care/child care
Special education
Technology
Transition
Transportation

You may not need information in all of these areas. Some areas may be addressed by organizations or agencies within your network, leaving you free to refer callers there and concentrate instead on collecting information on other, less well-covered topics. Typically, some parts of the resource collection will be much larger than others. The materials you collect should be specific to your audience and your areas of interest.

Finding Materials. When building your collection, make sure to contact organizations and agencies within your referral network (see Chapter 3), since many may be able to provide materials for your resource library as well as for dissemination. In addition, the staff of organizations in your network will be able to advise you on cost-effective means of building your library. Try to speak in person to the organization's information specialist, who may be able to direct you to resources not otherwise mentioned in the organization's general catalogue. It's always useful to talk to others in your field who have expertise.

It's also useful to know that the majority of books on disability issues are published by a few publishers (listed on the next page). Contact the major disability publishers for catalogues of their books. Many publishers are willing to provide free review copies of books to organizations such as yours, in the hope that you will, in turn, tell your customers about the publications. If you find that you must buy the books but have a limited budget, having the publishers' catalogues is still useful: You can use them to refer inquirers to books they may find helpful. Knowing what is available can also help you decide some of your future budgetary needs.

Also contact disability organizations, clearinghouses, schools, medical facilities, and nonprofit organizations; many such groups offer some or all of their information free of charge. Always ask if free copies are available, or if there are reduced prices for I&Rs.

Don't overlook your local public library. You may find many useful resources there. Ask the librarian to send you a list of titles in the library's collection of disability materials. Most libraries also accept requests for purchases; if they have a limited collection of disability-related books, you may be able to convince the librarian to buy some selected titles. This will be useful to the staff of the I&R and especially to the community at large.

You may find it useful to develop criteria for selection of resources. Examples of points to consider are:

- √ accuracy
- √ currency
- √ coverage of an issue
- √ point of view of the writers/organization
- √ reading level and educational level of materials
- √ format
- √ cost

Selected List of Publishers and Providers of Disability Materials

Clearinghouse on Disability Information, Office of Special Education and Rehabilitative Services (OSERS), Room 3132, Switzer Building, 330 C Street S.W., Washington, DC 20202-2524. Telephone: (202) 205-8241 (Voice/TT).

Council for Exceptional Children, 1920 Association Drive, Reston, VA 22091-1589. Telephone: (703) 620-3660.

ERIC Clearinghouse on Disabilities and Gifted Education, 1920 Association Drive, Reston, VA 22091-1589. Telephone: 1-800-328-0272.

James Stanfield Publishing Company, P.O. Box 41058, Santa Barbara, CA 93140. Telephone: 1-800-421-6534.

National Information Center for Children and Youth with Disabilities (NICHCY), P.O. Box 1492, Washington, DC 20013. Telephone: 1-800-695-0285 (Voice/TT).

PACER Center, 4826 Chicago Avenue South, Minneapolis, MN 55417-1055. Telephone: (612) 827-2966.

Paul H. Brookes Publishing Company, P.O. Box 10624, Baltimore, MD 21285-0624. Telephone: 1-800-638-3775.

Pro-Ed, 8700 Shoal Creek Boulevard, Austin, TX 78758. Telephone: (512) 451-3246.

Special Needs Project, 3463 State Street, Suite 282, Santa Barbara, CA 93105. Telephone: 1-800-333-6867.

Woodbine House, 5615 Fishers Lane, Rockville, MD 20852. Telephone: 1-800-843-7323 (outside DC); (301) 468-8800 (in DC metro area).

Consider making one person responsible for reviewing and purchasing materials.

Important!

> When you obtain a resource for your collection — whether it's a brochure, a newsletter, a catalogue — *always write or stamp the date on the resource.* ***Always.*** This lets you keep track of the age and currency of materials in your files.

Collecting and Maintaining Information on Organizations. Other resources for your collection come from your referral network — materials about (and from) specific organizations and agencies at the local, state, and national level. Such organizations include clearinghouses, voluntary and community organizations, professional organizations, disability organizations, parent groups, medical and other health care providers, and local, state, and federal agencies that deal with disability or education issues.

You will want to create files on these organizations. Include in each organization's file such materials as a brochure describing the organization and any catalogues or other useful publications the organization produces. Suggestions on how to identify and utilize these organizations are given in Chapter 3, where developing your referral network is discussed.

Organizing Your Resource Collection

The organization of your resource collection will depend on the size of the collection, the scope of your topic(s), and your budget. Some collections are computerized, cross-referenced, and designed to produce bibliographies and other information. Other collections are organized more simply.

Simplicity should always be your goal. In the beginning, it is of primary importance.

I&R libraries/reference collections are used more by staff than by the public and, therefore, your library should first meet the needs of your staff. Yours is not a professional library and does not need to imitate one. Organizing a collection in alphabetical order may be all that's necessary for effective staff use.

Books. Books should be shelved. It may be useful to place the books in alphabetical order by title. While shelving by title may seem simplistic, it *does* work.

If you have access to a computer and can pay a programmer, you can create a database of your resources, cross referencing your titles, authors, and subjects to include books, periodicals, and articles.

Subject Files. An important part of any I&R resource collection is typically its subject files. Housed in filing cabinets, generally in alphabetical order by subject, these files can include quite a range of information that information specialists and other staff will use to conduct research or respond to requests.

Each subject file may contain a vast amount of information, including:

- articles focusing directly on the subject;
- photocopies of the title pages of books on the subject;
- bibliographies on the subject;
- small booklets or newsletters on the subject; and
- a list of consultants or organizations that can provide additional support or guidance on the subject.

It's essential to identify what subject files should be called and to set them up in a way useful for staff. One method of identifying subject names is to consult the *Thesaurus of ERIC Descriptors*. The ERIC (Educational Resources Information Center) system includes a bibliographic database that provides abstracts of articles and other documents. The documents listed in ERIC include pamphlets, booklets, program reports, instructional materials, and conference papers which come from over 780 journals and magazines. These documents are indexed using key words (called *descriptors*), which allow individuals to search the database and identify documents in a specific area of interest. The *Thesaurus* contains about 10,000 vocabulary terms; more than half of these terms are main-entry descriptors. For each descriptor, the *Thesaurus* also includes broader and narrower terms that might be used instead, as well as related terms and more (the box below gives an example of this). The *Thesaurus* is available from Oryx Press (4041 North Central at Indian School Board, Phoenix, AZ 85012-3397); you may also be able to locate it in a large public library, a university library, or your school system's professional library.

ERIC's terminology offers you a ready list of terms that can be used to name your files. Your system will then be consistent with commonly used terminology in the disability and education fields. It also makes good

Example of an ERIC Descriptor Listing, with Narrower and Related Terms

ERIC Descriptor: DISABILITIES

Narrower Terms (NT)	Attention Deficit Disorders Behavior Disorders Communication Disorders Congenital Disorders Developmental Disabilities Diseases Hearing Impairments and so on...
Related Terms (RT)	Ability Accessibility (for Disabled) Adapted Physical Education Adaptive Behavior Assistive Devices At Risk Persons Deinstitutionalization Exceptional Child Research and so on...

sense to use terminology that is compatible with ERIC because, as your resource collection grows and staff conduct their own research, ERIC will be an important tool. In addition, people using your I&R may already be familiar with ERIC.

Newsletters, Magazines, and Periodicals. Magazines, newsletters, and journals are also staples of any resource collection and can be shelved in cases next to the books. Periodicals are a valuable resource since they are subject-specific and offer the most recent information on topics of interest to your I&R. You will want to allow room for this collection to grow; back issues are often useful and should not be thrown away just because new issues arrive.

Publications that deal with one specific topic or one specific audience might be filed either in a subject file (e.g., Accessibility) or in the files of the organization that produced them. Periodicals that address a single disability, such as "Speech," may be filed under that subject area. It is also worthwhile to select articles that address the information needs of your audience and file them in the appropriate subject files for easy reference. If your collection is computerized or annotated on a database, you can also include specific reference to selected articles in the database (e.g., author, name of article, date, title, journal, keywords).

Much of how you organize your newsletters, periodicals, and magazines will depend on the mission of your I&R and the size of your resource collection. Remember, your collection should be useful for *your* purposes. It should be set up to provide the information your staff needs to do their work efficiently. You will need to make your own decisions about what system of organization will work best for your collection, based on your needs, resources, and staff.

Information on and from Organizations. Files on the organizations in your referral network are probably best placed separately from subject files. Information on (and from) organizations can be filed in alphabetical order by name of organization and, within any organization's file, can be subdivided as necessary.

Subdivisions within each organization's file might pertain to the organization's services, publications, areas of interest, activities, and so on. For example, the file for a large national organization might be subdivided into: General Information (about that organization, including a brochure or publications list), Children's Issues, Adult Issues, Vocation/Employment Issues, and Newsletters.

Newsletters from a particular organization can be kept for a year, or less, depending on the space available and the nature of the newsletter. If the newsletter contains only local events, then it may become out of date quickly. If the newsletter offers practical advice, a review of policies, or a listing of local facilities, then it may be worthwhile to keep it longer. You will need to make this judgment individually for each newsletter.

Suggestions for Keeping Staff Informed

As your collection grows, you will face the challenge of keeping up to date on the types of information your collection includes. A collection, after all, is only useful if it is used! So how, in the midst of all other activities, do you keep yourselves informed about the ever-increasing resources in your library?

> *How, in the midst of all other activities, do you keep yourselves informed about the ever-increasing resources in your library?*

The answer will depend, in part, on how many staff you have and how large your resource collection is. Each I&R must develop a system to facilitate distribution of materials to all relevant staff. One method is to attach to new material what is known as a "routing slip;" this slip lists the names of all relevant staff who are to receive the new information. The material is then sent around the office; when staff members are finished looking at it, they check off their name and pass the journal or article on to another person on the routing slip. When all staff listed have seen the material, it goes to the library for filing or shelving. Another method is to have your librarian send out a weekly list of new resources to all relevant staff.

Of course, no one has enough time to read all the newsletters and periodicals that flood in. While being well informed is important, realistically most of us have many other duties sure to interrupt our reading time. Therefore, it is useful to know that there are a number of major publications which the smaller ones quote. You can save time by reading the full articles in the major publications and not the secondhand ones in the smaller.

Updating Your Resource Collection

As your I&R grows and time goes by, it will be necessary to update your resources, including the information you have on and from other organizations. While updating is a constant process and takes a lot of time, it is vitally important. The effectiveness of your staff and of the entire I&R depends on how useful, accurate, and current your information is.

> *All materials in your collection should be marked with a date — either the date the material was published or the date when you received the information.*

Updating Materials. Keeping your resource files — books, periodicals, magazines, etc. — current involves setting aside time and assigning staff to go through all files to check materials. As mentioned earlier, all materials in your collection should be marked with a date — either the date when the material was published or the date when you received the information. Request more current information as needed, and be sure to throw away outdated papers. If you only add and never subtract, your collection will become unusable.

Unfortunately, there is no blanket system for saying how old an article must be before it should be thrown away; this decision depends on the subject area and research in the field. For example, a 1978 article on drama for children with disabilities may be quite useful, while an article on facilitated communication from 1987 may not be current. Therefore, weeding out the files should be done by someone familiar with the topic area and the nature of the requests your I&R receives.

Updating Information on Organizations. Your resource collection includes the information you have gathered from and about other organizations. You may have this information organized in any number of ways — as "organization files" stored alphabetically in filing cabinets, as names and addresses listed on paper or typed on index cards or on a rolodex, or as information entered on a database. It's vital to keep this information up to date. Organizations frequently move, change phone numbers, and hire new staff.

As you become aware of changes, you will need to access however you have compiled your information on organizations and record the new information. This may mean writing a new index card, changing an entry in your database, or retyping a list. Suggestions for conducting updates systematically are given in Chapter 3, where aspects of your referral network are addressed.

There is no blanket system for saying how old an article must be before it should be thrown away; this decision depends on the subject area and research in the field.

Summary

Your resource collection is an essential part of the work you do, and maintaining it demands effort and vision. Through knowing your customer's needs, you will be able to identify and collect books, newsletters, journals, articles, and other materials you can use to respond to requests. You will need sufficient space to house your resources and a system for organizing them. It's important that the collection be easily accessible to staff and useful for their purposes. And, of course, no collection is ever complete. A collection keeps growing as new materials become available, and it needs weeding, lest it become unmanageably big and out of date. Thus, the basics of your resource collection are: identify, collect, organize, weed, update — and *use!*

The basics of your resource collection are: identify, collect, organize, weed, update — and use!

— 3 —
YOUR REFERRAL NETWORK

Your referral network is the group of organizations, agencies, or individuals whom you contact for information when you need it and to whom you send callers when they need information or services you do not provide. In many ways your referral network is part of your resource collection, allowing you to respond to the needs and concerns of your audience. For simplicity's sake, we will discuss the referral process as an issue separate from obtaining and maintaining a resource collection.

Organizations to Include in Your Network

There are many, many organizations that can become part of your referral network. Which you decide to include will undoubtedly be determined by the mission and scope of your I&R and the results of your needs assessment. If your I&R serves the state, you will probably be most interested in getting to know which organizations (or professionals) provide services or information throughout the state or within certain regions of the state. If your I&R serves only part of the state or one county, then you will want to identify local groups serving that area. However, don't overlook national groups, even if your I&R serves a more local area. National groups have much to share, including publications, technical assistance, and referrals of their own.

Here is a partial list of some organizations you might consider contacting for the purpose of network building.

<u>National Groups</u>
Federal agencies
National clearinghouses/information providers
Professional organizations
National offices of disability organizations

<u>State Groups</u>
State agencies
Clearinghouses/service providers in the state
State affiliates of national disability organizations
State chapters of parent groups
Medical and other health care providers
Volunteer organizations

<u>Local Groups</u>
Schools
Community organizations
Parent groups
Local agencies
Local medical or other health care providers
Libraries

Building the Network

There are two aspects to building a referral network: Getting to know other organizations, and letting other organizations know about you.

Getting to Know Others. Identifying organizations for your referral network is a gradual process, in which learning of one group leads you to another and another. Start by identifying those organizations most central to the mission of your I&R. For example, if your group has been developed to respond to local needs, then concentrate on local resources. You probably already know one or two organizations you would include in your network; start there. Here are some other suggestions.

- Contact the organizations you've identified and ask them to send you whatever materials they have on their mission and activities — brochures, catalogues, publications.

Developing an understanding of what each organization does is important to making good referrals . . .

- Put a date on this information when you receive it and file it in whatever way you have determined is most efficient for your needs.

- Always ask organizations you contact if they know of any other organizations that might be helpful to your audience or for addressing particular concerns (e.g., transportation, financing health care, early intervention).

- Then contact those organizations for their information.

You'll be amazed at how fast your referral network grows! The materials you receive will help you learn about the organizations in your network beyond where they are located. Developing an understanding of what each organization does is important to making good referrals, because your referrals are then based upon knowing what types of services an organization provides, what the needs of its customers typically are, what eligibility requirements exist for accessing their services or products, and so on. Consider visiting local organizations to get to know more about them. Knowing a lot about the organizations (and professionals) to which you refer your audience serves two purposes:

- You can direct inquirers to the most useful resources; and

- You can help your referral network by sending them only callers whose questions and concerns fall directly into their areas of expertise.

Letting Others Know About You. When you contact organizations for their information, don't forget to let them know about you! This means you tell them what you are doing and for whom, so they can add your center to their referral list or database. This process is called *networking*, and is crucial to an effective I&R center. Effective networking is ongoing and an important part of your outreach efforts. (See Chapter 5 for a more detailed discussion of outreach.)

A *brochure* can be very helpful in letting others know about your group but is not really necessary if you have budget constraints. A neatly typed description of your basic philosophy, goals, services, hours of operation, address, and phone number may be all you really need. However, if you have a little extra money, a brochure and/or a rolodex card with your I&R name, address, and phone number can be very useful and can take the place of business cards.

Using Your Referral Network

There are many ways to make use of your referral network. The most obvious is referring a caller to another organization that provides information or assistance which your I&R does not. This type of referral is at the heart of responding to information requests.

Maintain Confidentiality!!

> Do not give the name of your caller to any organization, unless the individual gives you permission. This restraint pertains to *confidentiality*, which is discussed more fully in Chapter 6 of this guide.

There are other ways to use your network besides making referrals, including:

- Making lists of organizations or individuals who might be contacted regarding particular subjects (e.g., summer camp, respite care, assistive technology, special education, support groups) and disseminating these lists in response to questions from your audience;

- Including brief lists of helpful organizations at the end of publications you produce;

- Obtaining materials and technical assistance from the organizations; and

- Compiling a mailing list of organizations.

A *mailing list* of your network will be vital for sending out your materials and for contacting groups to get their most current materials. The mailing list can also become a base of information from which you develop materials on specific subjects.

Updating Information on Your Network

Once a year you need to consider sending an update form to the organizations and individuals within your referral network. This form may be simple — just asking recipients to indicate if their name, address, or telephone number has changed — or it could be more detailed. As your referral network grows, a sensible procedure may be to divide the task of updating so that you check up on organizations in batches rather than all at once. When your referral network is large, it certainly is easier in terms of staff time and effort to send out — and receive and process! — a small number of update forms several times a year than to send out (and face receiving) several hundred at once. Two practical suggestions:

Once a year you need to consider sending an update form to those organizations and individuals within your referral network.

- Be sure to date all information you receive from organizations so that you will know when information on each was last updated; and

- Be sure to keep track of the update requests you have sent out so you can record the responses and keep track of the organizations that may need a second notice or phone call.

If you disseminate lists of organizations to any of your callers, you can also invite them to help you keep information current. Add a note to your materials which asks people to call or write to you with changes. Because changes occur regularly — organizations move, telephone numbers change, a contact person leaves and a new one is designated — it's a good idea to photocopy rather than commercially print any lists of organizations you disseminate. That way you can readily make changes on your lists without having to throw away hundreds of copies of commercially printed (and suddenly incorrect) lists of organizations.

You can also invite (your customers) to help you keep information current. Add a note to your materials which asks people to call or write you with changes.

Summary

Your referral network — the organizations and individuals whom you call for information and to whom you send your customers when appropriate — is as important to the operation of your I&R as your resource collection is. In fact, your network is a part of your resource collection, often forming the basis of your response to your customers' questions. As such, it is vital that you develop a network of organizations and individuals who can help you help others. Outreach to other groups is a part of this; so is telling others about yourself.

Knowing about the organizations in your network will help you refer your customers to assistance appropriate to their needs. And keep checking those addresses and telephone numbers, because someone is sure to be moving!

— 4 —
STAFFING

Staffing is a central concern for I&Rs, for many reasons. Most I&Rs cannot afford to hire a large staff, which means a smaller group must do the work of many.

Because the staff — particularly the information staff — work extensively with the public, it is important that the staff have a feeling for their job, a commitment to the well-being of others, and a genuine desire to help customers find information and assistance.

Luckily, those who work in the disability field often do have such a commitment. But commitment is not enough. You must be prepared to provide all staff with a clear idea of their role within the I&R and the training and support they need to succeed and grow in that role.

Legal Matters in Employing Staff

Before you hire anyone, make sure you inform yourself about relevant labor and other laws that impact the hiring and employment process. What do laws such as the Americans with Disabilities Act (ADA), the Equal Employment Opportunities Act, and the Civil Rights Act of 1964 have to say about acceptable employment practices? What payroll procedures (e.g., deducting federal and state taxes, social security) must you have in place and adhere to when you employ someone? What provisions for health insurance, vacation or sick leave, or overtime must you implement? Specific legal matters are beyond the scope of this guide. You may wish to consult your lawyer about these important issues.

Defining Jobs

One of the first steps you will need to take before hiring anyone is to *define the job* that the person is expected to do. This entails writing a job description: what the person will do in the job and what skills, experience, or education are required to do those activities. A job description for an information specialist, for example, may include such duties as: answer the phone, respond to requests, develop standard materials for responding to requests, and manage the resource collection. Therefore, an information specialist needs to have good telephone skills, be able to listen well and keep a conversation short and to the point, and be able to write well, use your computer system, and work comfortably with the type of resource collection you have.

There is really only one primary job at an I&R, and that is responding to requests. This is everyone's job . . .

With a job description, you can then search for staff who have the skills and education your I&R requires. You may want staff to have experience and/or training in a specific disability area or in an area such as education or working with families. Many different people have experience in disability issues: a person who has a disability; a professional trained in special education, nursing, social work, or the like; a parent or sibling of a person with a disability; or someone with previous I&R experience.

Although a job description for each staff member is important, staff need to be flexible. There is really only one primary job at an I&R, and that is responding to requests for information. This is everyone's job, no matter what his or her title may be or what the job description may say. If the person responsible for stuffing envelopes is not in, then coworkers need to take care of the mail. If the person who answers the phone is absent, then someone else needs to take over. When staff work as a team and support one another, an I&R will run efficiently. Strong teamwork strengthens everyone, broadens the I&R's knowledge base, and is good for morale.

Training Staff

No matter how experienced staff are, when they begin to work for your I&R, it's a good idea to have a training program in place to prepare them to meet the goals of your organization. At a minimum, new staff need to be familiar with:

- your philosophy and mission;
- the needs, concerns, and interests of your customers;
- the resources in your collection;
- your referral network;
- "hot topics" to either avoid or include; and
- the equipment you use.

Be sure to designate one staff person to be available to help the new person for the first six months, and always encourage new staff to ask lots of questions.

Preventing Burnout

There is an enthusiasm that comes to people whose work is vital and serves a need. But how do you keep staff enthusiastic?

When people feel they are doing their job well, and when they feel appreciated, then their enthusiasm can be maintained — maybe not every day but certainly every week. If the nature of the I&R is like the complaint department, that is, people only contact you when things are not going smoothly, then your I&R may not have the feeling of success you would like.

It is generally better to limit the scope of your work and do that well.

Staff morale is maintained by supportive leadership. Here are some suggestions on how to support staff and prevent burnout.

- Overextending a small number of people causes burnout. It is generally better to limit the scope of your work and do that well.

- Keep an "In Praise Of" file for staff to access whenever they need a lift. Every thank-you letter you receive from customers should go into the file.

- If you are doing a good job, a questionnaire sent to customers and asking about the quality of your services will produce positive results. You should make much of these results and always shared them with staff.

- Get together with staff of other I&Rs occasionally to share experiences. These gatherings will encourage pride and camaraderie.

- Talk among yourselves about what you're doing, your ideas, frustrations, successes. What are in-house needs? What would help make the job go more efficiently? Where do staff need help? It is important for staff to interact and exchange information, as this is the basis for teamwork. It also is important that managers listen to and respect the opinions of staff.

- Provide training seminars on a regular basis. Invite speakers on subjects of interest to your staff — perhaps someone from the local social security office, from a hot line, from a local university, or a local school administrator or teacher, or perhaps an adult with a disability who can talk about independent living. Mini-seminars build your expertise and help you do your work more effectively. They also help staff members "grow" in their jobs, build their expertise, and confirm their strengths.

- Develop a "to-do" file of jobs that need to be done but may not be a priority or part of the regular workscope. Each staff member can either contribute to this file or maintain his or her own file. Then, when the hour or day arrives (and it certainly will) when a person simply has had enough, there is productive but different work to pick up. Not only does this offer a break, but it allows staff to develop products, materials, or ideas for the I&R and see their ideas come to life.

- Be sure to give authorship credit to staff members who develop material. This encourages people to contribute in their own areas of strength and interest and to take breaks from daily work in a constructive manner. It also allows the I&R to grow and be revitalized from within.

- Encourage staff to attend conferences, which offer an opportunity for revitalization and a way to build your I&R's resources. As your budget permits, staff may attend local or national conferences to develop networks, learn, and collect materials. Information specialists, in particular, might be given priority in attending conferences; they are your "main line" to the public and need to be current on information and networks.

Staff morale is also supported by scheduled breaks. To this end, have regular parties — celebrate birthdays, staff joining your group or leaving, the attainment of some project goal. The parties can be simple, such as ordering a pizza, or more elaborate, with everyone bringing food to create a "pot luck" lunch. An hour shared, away from the demands of the job, can do wonders for pressured staff.

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CONDUCTING OUTREACH

You need to let people know that your I&R's services are available, what these services are, and for whom they are meant. "Marketing" your I&R calls for creativity, with outreach serving as a key component of the marketing plan. Here are some ideas as to how to conduct outreach regarding your I&R.

- Place announcements in local papers, in school newsletters, or on bulletin boards in libraries, clinics, work sites, and the like. You may find local radio or TV stations willing to announce your I&R.

- As you identify other organizations and develop your network, send them a camera-ready (this means text that is ready to copy or print) SHORT announcement of your services, address, and phone number, and ask them to print this in their next publication.

- Go out and talk to people who work with the same people you serve. Visit schools, independent living centers, and local hospital nurseries, and talk to people about what you do. Be sure to leave printed information, such as a brochure (see Chapter 3) or a publications list.

- Find out the dates of conferences or meetings of potential interest to your audience. Ask if you can set up a display, put your brochure in the conference registration packets, place materials on a handout table, or present a session about your I&R. Often you can volunteer to help set up or register attendees, or help in some other way to get to know people. This is networking, a part of outreach.

Be sure everyone knows how, where, and when to reach you. People need to know how to get in touch with you, what kinds of services to expect, and the time you take to respond. Inquirers, when they know what to expect, will become comfortable with using your I&R and will spread the word that your I&R is accurate and reliable. "Word of mouth" is a powerful advertisement and a strong measure of your success.

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RESPONDING TO REQUESTS

Responses are the heart of the I&R service. When a customer calls for assistance, they generally need a friendly, attentive person on the other end of the line, information that is relevant to their needs, and as short a response time from you as possible.

To accomplish a friendly, accurate, and efficient system of responding to requests, your I&R will need to consider several major issues. This chapter is devoted to discussing some of the most important matters involved in responding to requests.

Developing a Variety of Response Types

Your customers will undoubtedly come in all shapes and sizes, as will their questions — and your answers. One answer, in the world of the I&R, does not fit all. A well-informed customer who has access to computerized information systems and a large library may be pleased to receive a bibliography of references from you; a mother with a chronically ill infant living in a rural area may not find the same bibliography useful at all. Therefore, you need to be able to respond in a variety of ways, depending on the needs and concerns of each inquirer.

Developing Your Own Materials or Using Someone Else's Materials. Although each caller must be treated individually, with an ear that is alert to determining his or her specific concerns, it is nonetheless likely that many of your callers will be asking the same or similar questions. You are operating an I&R with a particular focus, and this will tend to define the type of calls you most often receive. Your focus will also drive the information or referral sources you must have available in order to respond effectively.

By finding (or spending time developing) comprehensive, well-written papers that discuss particular issues, you will save a lot of time you might otherwise spend answering the same question over and over again.

As you set up your I&R, make a list of the types of questions you anticipate receiving. (Referring back to the needs assessment of your audience may be helpful here.) Search for — or develop — materials that answer those questions. These standard or generic materials will help you respond efficiently to volumes of requests on the same subject. By finding (or spending time developing) comprehensive, well-written papers that discuss particular issues, you will save a lot of time you might otherwise spend answering the same question over and over again.

Your materials do not need to be lengthy; a two-page resource list of school people, medical people, recreation facilities, or employment agencies may be all that's necessary to highlight referral resources for many of your callers. When developing your own materials, however, be careful to find out the vocabulary currently being used to describe people with disabilities and, specifically, the terminology used in your subject area. It's important to be correct and nonoffensive. You will set an example for others as they use your materials.

Before the first year of your I&R's operation is over, your staff should know which standard materials are in stock, which can be obtained from other sources, and which will need to be developed in-house. Development of standard information packages is an ongoing process, with more packages being put together as you have the time, money, and expertise.

The good news is you don't have to write all these materials yourself! Many organizations provide materials free of charge or without copyright restriction. The Arc (formerly the Association for Retarded Citizens of the United States), March of Dimes, Easter Seals, Vocational Rehabilitation Centers, Social Security Administration, State Departments of Education, and many other organizations have basic resource materials available that can augment your standard response collection. (To contact these groups, consult your local phone directory.) Be sure to respect copyright laws, however. Not all materials are available without copyright. More information about copyright protection is given later in this chapter.

The good news is you don't have to write all these materials yourself!

Individualizing Responses. Of course, many requests are more complex and cannot be answered by standard materials alone. A complex request may require:

- searching your resource collection and selecting appropriate materials to send out;

- searching other databases;

- finding an appropriate referral source for the request, in addition to or instead of those listed in standard materials; and

- writing an individual letter or making a phone call to discuss problem-solving approaches with the customer.

Providing Information in Alternative Formats. Information should also be available in alternative formats for customers with disabilities. Alternative formats include materials in braille or large print, on audiocassette or computer disk, or in another language, if a portion of your audience does not speak or read English well. You may wish to respond to such needs on an individual basis by identifying a group or service that can supply the alternative format upon request. For example, some organizations serving individuals with visual impairments may agree to produce, on an as-needed basis, braille or large print versions of information you supply on disk.

Targeting Responses to User Needs

Deciding which materials to send or which referrals to make is a judgment call that your information specialists will need to make for each customer. For example, will this individual benefit from referral to a specialist, from a resource list of referral sources along with information on the subject, from a bibliography of materials, from a letter, from copies of articles, or from a phone call?

Making these determinations is not always obvious or easy. Information specialists often find that callers are not precise in making a request. Some callers may tell a lengthy story and never ask a question at all. Through listening and asking questions of their own, information specialists can help callers define the nature of their information needs and, in turn, an appropriate response. Having standard materials in several formats (e.g., both English and Spanish, low reading level materials, on audiotape) will assist information specialists in individualizing responses to fit callers.

Sending the Right Amount of Information

How much information is enough? When you have a lot of information available, it is tempting to send a customer as much as possible. There are at least two potential drawbacks to doing so, however: One is the cost of postage, xeroxing, or printing; the other is the possibility of overwhelming the customer with information. Some callers are not ready to read volumes on a painful subject, and many simply won't have the time.

Therefore, "how much information is enough" may be a decision best discussed by all the staff at your I&R and then decided on a case-by-case basis. Some questions require more information than others. Some people may ask broad questions or several questions in one inquiry. In other cases, the question may be relatively straightforward, but there may be a great deal of information available on the topic. Realistically, there will be weeks when you are very busy and don't have a lot of time to spend on each response, so your responses will be briefer.

It may be useful to survey the people who use your I&R to see if they feel their questions have been answered sufficiently. This is part of the evaluation process. There are several ways to do assess the completeness and usefulness of your I&R's responses.

- Occasionally make follow-up calls to inquirers to ask how they felt about the service they received.

- Include a self-addressed postcard with randomly selected responses and ask people to check several boxes related to the sufficiency of services you provided.

Evaluation of your work is important to knowing how you're doing and knowing what changes, if any, should be made in the operation of your I&R. Evaluation issues are discussed more fully in Chapter 7 of this guide.

Handling a Volume of Requests

Answering the telephone, particularly when it's constantly ringing, is a demanding task. You can streamline the process of answering phone calls by developing a form to record the caller's request. Having a form to fill out helps direct your conversation and ensures you collect all the information you need to reply. This will also form the basis for record-keeping and for evaluating the scope of your work. Be sure to date caller's requests, so you know when they were received and how long you're taking to respond.

If you have a limited number of staff, you may also find it useful to restrict the times people can call and speak to someone personally. You don't have to miss inquiries, though, if you invest in a telephone answering machine. You can either buy a machine or have this service provided through the phone company. The answering machine should play a recorded message that states clearly the specific information you need from the caller in order to respond. Ideally, you will not need to return the call but can send the caller the requested information based on the message taken from the answering machine. This is cost-effective for you and time-efficient for the caller.

You may also find it useful to divide up areas of responsibility among information staff. If the people who answer inquiries have specific areas of responsibility, then they can become more familiar with the resources and networks within those areas, read publications specific to those areas, and attend conferences. This allows staff to respond efficiently to requests.

It is an undeniable fact that, in the I&R business, requests can pile up. To avoid stranding requests at the bottom of a pile, sort them by days of the week. Get slots or boxes in which to put unprocessed requests and label them Monday, Tuesday, Wednesday, Thursday, and Friday. Requests received on Monday go in the Monday slot and do not end up beneath requests received on Tuesday. This is a sure-fire way to make sure that no one request stays eternally at the bottom of a pile.

Finally, be sure customers have an idea of how long they will wait to receive a response from you. People can wait two or three weeks to receive a response IF they are expecting to wait that long.

Giving Advice and Making Recommendations versus Providing Information

Information providers need to answer questions carefully, as there are several areas of potential concern here.

Often, customers will request medical advice or recommendations for a "good" doctor or medical facility. In these cases, an information provider must clearly explain that an I&R cannot diagnose a condition or recommend specific doctors or facilities. You can give out doctor referral numbers or the names of several specialists in the area with the understanding that you are not recommending anyone but merely putting people in touch with an office that can answer some questions. It may also be useful to provide some general information for the inquirer on how to locate and select medical professionals for the family's needs. Information on who provides a specific type of care or treatment is different from the recommendation of a specific name. Clarify for yourself, your staff, and the customer the difference between providing *information* and giving a *recommendation*.

Similarly, callers may ask for the "best school" for a child. Again, it is difficult for an information specialist to know what another person defines as "good" or "best" or to know a particular child's needs. Explain that one person's criteria for defining "best" may not be another person's idea of "best." Offer a list of schools in the area, and explain to the customer that it is useful to visit schools, talk to the staff and administration, and talk to parents of other children in that school system. Explain that federal and state laws apply to all schools, but that service provision varies by locality, individual school, and teacher. Stress the difference between providing information about schools located in the area and making a recommendation about a specific school or program. Personal recommendations from one person to another are useful and legitimate, but *an I&R typically offers information and referral, not recommendations.*

Clarify for yourself, your staff, and the customer the difference between providing information and giving a recommendation.

In the case of inquiries for legal advice, providing information on the laws and policy and referring callers to legal counsel are appropriate roles for an I&R. You can send copies of laws, articles on similar situations and their resolutions, case histories, and bibliographies of newsletters, journals, or books on legal matters. You can refer callers to:

- State Protection & Advocacy Agencies (listed on the NICHCY *State Resource Sheet*),
- legal aid providers,

- lawyers who specialize in the caller's area of concern, or

- other state or national organizations.

If your I&R anticipates requests for legal assistance, then it would be useful to research local legal services. Contact your state's Protection and Advocacy Agency, and talk about the types of legal questions you are receiving. (Always remember to protect the identity of callers by not giving out their names.) Some of these suggestions might also be helpful:

- Encourage potential plaintiffs to contact legal advisors for an initial interview. Emphasize that all cases are unique, and encourage your callers to ask local legal advisors about an initial free interview.

- If the subject of legal inquiries is predictable, collect your state's policies in this area, as well as federal laws, so you can provide copies to inquirers. If you need assistance with collecting policies and laws, you can call the national office of a major disability organization and ask to speak to their resident legal counsel or person who handles such inquiries.

People's Right to Privacy

Everyone has a right to privacy and, in the case of students with disabilities, it is unlawful to violate privacy. *Do not disclose the names and addresses of individuals who contact you.*

It is important for everyone on your staff to be familiar with the need for confidentiality. Establish in-house policies, such as never sending a letter your organization received to another organization, and being sure the inquirer is given the name of a referral source rather than sending the inquirer's name to the referral source. Maintain a caller's right to privacy even when you return telephone calls — identifying your I&R by name to a receptionist, co-worker, or even a family member of the customer may spotlight information he or she would prefer to keep private. Your customers will be reassured to know their requests are confidential.

Other Response Issues

Observing Copyright. As was mentioned earlier in this chapter, one of the most common questions faced by I&Rs is "Can we send out another person's materials?" This is a copyright issue. Basically, you can refer people to published materials, but unless the material is copyright-free (in other words, there *is* no copyright), you may not duplicate the material without specific permission.

Using copyrighted material can be handled in several ways. You can contact publishers and ask their permission to duplicate materials. You will need to cite the source — that is, be sure people who are getting the material know who wrote and published it and the date of publication.

Articles from periodicals can be handled in a variety of ways, depending on the policies of the publisher. Contact the magazines or newsletters you find particularly interesting and find out their policy regarding duplication of their materials. Some publishers permit organizations to supply copies of an article at a reduced fee. Other publishers use copyright clearinghouses to handle all requests for duplicate copies of articles or journals. Still other publishers are open to making individual arrangements; for example, you may be given permission to duplicate any article, provided you include information on how to subscribe to the publication with each copy you send out.

Don't despair if you cannot obtain multiple copies of articles or longer works such as books. Ask the publisher to send several copies of catalogues or fliers describing the works. These can be sent to inquirers who can then choose to purchase the book or look for it in a library. You can also make and disseminate a bibliography listing materials by subject or need area. This can be a formal bibliography or an informal list of materials. *It's important to include information on how to order or borrow the materials.*

For Example!

Cutler, B.C. (1993). *You, your child, and "special" education: A guide to making the system work.* Baltimore, MD: Paul H. Brookes. (Available from Paul H. Brookes Publishing, P.O. Box 10624, Baltimore, MD 21285-0624. Telephone: 1-800-638-3775.)

Happily, many materials have no copyright and therefore may be copied. This is true for NICHCY publications; in fact, NICHCY encourages further distribution of its materials. Other organizations may have the same policy — check with them to be sure.

Mailing Cost-effectively. Depending on the volume of mail you send out, you may need to become familiar with (a) bulk rate mailing procedures and regulations, and (b) third class mailing requirements. When you mail in bulk, you may be eligible for reduced rates, provided you follow prescribed rules for preparing the mail. For your day-to-day mailings, it is useful to know that mailing materials third class is less expensive than mailing them first class, although it will take more time for the mail to reach its destimation. Information on these, and other, ways of mailing is available from your local Post Office.

Recordkeeping. It is important to keep records of the work your I&R does. Some items to track are:

- the types and numbers of *requests* received;
- the types and numbers of *materials* sent out;
- the types and numbers of *referrals* made;
- how much *time* it takes to respond to requests; and
- the *cost* of operating the I&R (e.g., staff costs, postage, duplicating costss, rent, publications).

You will need this information to report to your funding source, to measure of fund-raising needs, and to evaluate your operation.

Recordkeeping should be an ongoing effort, kept accurate and simple. Set up a system that works well for your staff with the equipment available to you. If you need assistance in establishing such a system, consult community organizations and businesses for volunteers to help you get started.

Summary

Responding to requests for information and assistance is the chief work of an I&R. This activity is challenging and, when well done, is highly satisfying to staff and customers alike.

To facilitate your ability to respond quickly and appropriately, it is helpful to have a set of materials prepared to respond to the most common questions you receive. This may include materials from other organizations that you use with permission, and materials your I&R develops. Standard packages save you the effort of researching the same questions over and over and frees time to address callers who have complex questions requiring investigation.

I&Rs need to be cautious when answering questions, due to the enormous difference, yet thin line, between giving a recommendation and providing information. Staff must also understand and respect each customer's privacy and confidentiality.

When all is said and done, answering requests is the concern of everyone at the I&R, regardless of their official job title. All staff efforts support the I&R's ability to respond. And you'll be pleased to know that you must be doing your job well when the phone keeps ringing!

— 7 —
EVALUATING YOUR I&R

Evaluation is a key component of an I&R. When you begin to plan your I&R, you must consider how and when you will evaluate your work, for evaluation is as important to an I&R as hiring the right staff. While evaluation does not have to be complex, it is so crucial that we have listed a number of evaluation resources in the "Readings" section of this guide. Additionally, there are many consultants who can help you develop an effective evaluation plan.

There are two types of evaluation that must occur in order for an I&R to grow and remain efficient: (a) ongoing evaluation, sometimes referred to as formative or process evaluation, and (b) summative evaluation, which looks at your I&R's performance over the past year.

Ongoing Evaluation

Ongoing evaluation is just that — ongoing. With this type of evaluation, you constantly monitor the processes you use to operate your I&R to see that things are running smoothly and, if not, to change aspects of your operation. While ongoing evaluation is often informal, it must be included in the overall plan and operation of the I&R. Thus, it merits as much thought as a final, or summative, evaluation.

To find out how well your I&R is functioning, to know if you are giving your customers the information they want, to find ways to improve effectiveness and conserve time and resources, to maintain the usefulness and currentness of information, *ask*. Ask continually.

Whom do you ask? Your customers, your staff, and other organizations in your network. Ask through a variety of means:

- Enclose feedback cards with the materials you send customers;

- Conduct short, random surveys of segmented groups of your customers (i.e., families, organizations, others);

- Conduct surveys at conferences, speaking engagements, and poster sessions; and

- Discuss with other I&Rs all aspects of I&R operation.

As has been previously stated, "The I&R's services are consumer driven." Therefore, it is important to know not only what information your customers have found useful, but what they have *not* found useful. Ask why! Ask what methods of response are most helpful, and ask them to make suggestions for future publications, meetings, or activities. You may want to conduct surveys of, make phone calls to, or meet with customers. And then listen to what they say.

Continue to collect basic information about your customers and the nature of their requests. Are your callers families, educators, health providers, adults with disabilities, students? With what frequencies do callers inquire about children in specific age groups? Are people asking about legislation, transportation, IEPs, recreation, financial needs, or medical care? Continually look for patterns in requests to help you respond; identifying patterns also helps you identify your strengths, weaknesses, outreach needs, successes, and future products.

Continually refer to your needs assessment. If you identified your audience and their various needs, compare those findings with the information and services your I&R is providing. Do the inquiries you receive reflect the population you originally identified, or are only some of these people using your I&R? Do the materials you collect and develop provide information on the subjects originally identified as need areas? Do you think your audience has changed since you conducted your needs assessment? Should you conduct another needs assessment?

Evaluation is important not only because it helps you respond to your customers but because it helps you manage the I&R. Ongoing evaluations are your best management tool, if you let them be. The information you gather should tell you what you are doing and what needs to be done, and will affect allocation of staff, resources, and consultant time — literally all components of operation.

For example, if your needs assessment tells you that your information is not current, this means time and resources must be devoted to improving the library, collecting better materials from conferences, giving the information specialists more exposure to current thinking, and freeing up time for them to attend conferences and read journals and articles.

Summative Evaluation

Summative evaluation (also called outcome or impact evaluation) is not ongoing but is done at some point in the year to determine what your I&R has done and how well. This type of evaluation can be punitive, or it can be extremely helpful for future planning and vision setting.

A summative evaluation is typically performed by an outside party with expertise in I&Rs, and often results in a report for a funding agency or board of directors/ advisors. The summative evaluation is a fresh look at your I&R by an expert who can provide new approaches, ideas, and insights into what is being done — in general a fresh view of what, to you and your staff, is daily routine.

When beginning your I&R, it is useful to identify the person (or persons) who will be responsible for conducting the future summative evaluation of your center. The first thing you must do is communicate to the evaluator what it is you are interested in finding out. The evaluator may wish to receive materials and reports throughout the year. You should also share with the evaluator your concerns and ideas for making the I&R more efficient. Staff also can communicate with the evaluator; encourage honesty and forthrightness in their responses, some of which will pertain to you, your vision, and management of the I&R. If employees raise significant concerns during the evaluation, these concerns should be addressed in a respectful, confidential manner.

A good evaluator working with a committed staff will turn the evaluation process into a growth experience. The evaluator will discuss the general findings of the evaluation with the entire I&R staff and will make recommendations, indicating directions the I&R should move in or changes that need to be made.

The evaluation process is time consuming and can be expensive, but it is a necessary activity for an I&R. The suggestions presented in this guide are among the most simple and effective for finding out the truth about how your I&R is doing.

For evaluation assistance, look to people in your local community who may have experience with evaluation and ask people to volunteer for some of the tasks. A consultant with the needed expertise, located at a local business, college, or high school, can help by spending time with staff and by reviewing the daily functioning of the I&R, with the goal of improving its operation. And remember, volumes have been written on evaluation. You can learn a great deal about the process by reading any of the evaluation books listed in the "Readings" section of this guide.

Evaluation and needs assessment data are the keys to your becoming successful at what you do. In this very reactive business, your data eventually will assist you in anticipating issues and being on top of trends, and will continually reinforce the need to plan ahead and to communicate with other I&Rs. Your evaluation results will also remind you of the importance of the job you are doing.

IN CONCLUSION. . .

It has been said that information is power. As an information and referral center, you are a broker of information, providing essential linkages between people who need information and those who have it. For individuals and families who don't know where to turn for help, you will be able to provide direction.

The information field is for those who consolidate, classify, and organize. It is a field whose technology is growing daily and whose influence can be felt in the neighborhood, the state, or the nation. With current technology, we can sit at our computers and search a world of knowledge and then pick up the phone and make a difference in the life of a child. Your I&R team can be the catalyst for changes at all levels, for expanding the options for the people you serve. This is an evolving field, and you are a part of it.

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Materials from the Alliance of Information and Referral Systems (AIRS)

AIRS is a membership organization that makes many materials available on the subject of information and referral, including manuals to help organizations establish an I&R, a comprehensive bibliography of I&R literature, and their journal *Information and Referral*.

Contact AIRS, for a publication list and for membership information, at: The Alliance for Information and Referral Systems, P.O. Box 3546, Joliet, IL 60434. Telephone: (815) 744-6922.

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