

# Training Guide

*I&R and Contact Center Training Practices*



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# Introduction

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This document was created as a technical support and help guide for the 211 Contact Centers in Illinois. It has been thoughtfully curated to align with Inform USA standards and industry best practices to assist each 211 Contact Center in improving the knowledge, skills, and abilities of its employees.

211 Illinois would like to thank Edward Perry, Richard LaPratt, and Heather English for their leadership and expertise in compiling this document.

## Purpose

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The 211 Illinois Training Guide was created to provide a framework for training curriculum development and standardization across all contact centers. This guide will be a working document that will be reviewed and updated at least annually. With intentionality, this training guide will focus on:

- Contact Center Industry Best Practices,
- Contact Center Operational Excellence,
- Data Curation and Database Maintenance Excellence,
- Disaster Operational Best Practices and
- Inform USA Accreditation, Standards, Individual Certification, and Digital Training.

Created in 2009, 211 Illinois was designated as the lead entity to drive 2-1-1 service expansion across Illinois. Established in Illinois state legislation (2-1-1 Act) in 2010, we provide oversight and technical support to the 211 Illinois Statewide Network and work to sustain and grow 2-1-1 services across Illinois 24 hours a day. Our vision is for a fully integrated, funded, sustainable, and high-quality 211 Illinois Statewide Network available to everyone in Illinois. This vision cannot be achieved without strong local support and a commitment to fund and market 2-1-1 services.

211 Illinois coordinates, funds, and guides the 211 Illinois Statewide Network toward achieving high-quality service delivery. We invest in training and education for contact centers, support and drive I&R and Contact Center best practices, and invest in the core 2-1-1 services across Illinois. These activities lead to service alignment and continuity of 2-1-1 services statewide. 211 Illinois designates the 2-1-1 number to a provider and works with the Local Exchange Carriers (LEC) to route the 2-1-1 dialing code across Illinois.

We also work collaboratively statewide with our United Way, Health Department, and Government partners to advocate, market, promote, and outreach to the local community around 2-1-1 services. We provide technical assistance and guidance to local, state, and federal partners to educate them about the impact of the 211 Illinois Statewide Network on Illinois residents. This includes education and advocacy for 2-1-1 services and the 211 Illinois Statewide Network.

# 211 Illinois Training Support

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211 Illinois will collaborate with the 211 Illinois Statewide Network Contact Center to facilitate training opportunities around statewide issues. We will also support your training departments by providing guidance and technical assistance to improve your service quality. When staff and contact centers perform well, it has a positive impact. Successful performance strengthens contracts, fuels growth, and enhances services for individuals and families. To maintain this positive trajectory, proactive measures should be taken promptly. Continual excellence ensures the success of both 211 Illinois and the service delivery of each 211 Contact Center.

## Accreditation and Certification

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Each 211 Illinois Contact Center should have two main organizational goals in mind. First, to achieve Inform USA Accreditation and maintain it. Second, employ nationally certified information and referral and call center industry staff. 211 Illinois is committed to supporting each center's efforts toward national organizational accreditation and individual staff certification.

### Why is this important?

**Accreditation.** 211 Illinois Contact Centers should strive for continued operational excellence. A successful Inform USA Accreditation Award is a milestone showing your local community and your organization's commitment to quality and excellence. This will improve your organizational credibility and display to your community a marker of excellence.



**Certification.** For individuals, there is no higher honor in the I&R field than achieving individual certification. There are several certifications available for staff, supervisors, and directors from Inform USA, The Resource Center for Customer Service Professionals, and the Internal Call Management Institute. Employing nationally certified staff brings credibility, expertise, and excellence to your organization. This is a beacon to all staff that your organization values high-quality service delivery.



#### FOR YOUR AGENCY

- Role definition and professionalism
- Potential increase in funding
- Quality Assurance



#### FOR YOU

- Professional recognition
- Increase skills, knowledge, and confidence
- Increased competitiveness as a job candidate



#### FOR YOUR COMMUNITY

- Improved customer service.
- Commitment to best practices for information & referral
- Leadership of community change and development

This document will be focused on developing and implementing a comprehensive training curriculum that prepares staff for certification through Inform USA.

# Constructing Your Training Curriculum

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Constructing an effective training curriculum is essential for the success of your learners. Here are some key steps to consider when building out your training program:

1. **Define Clear Objectives:** Start by considering the overarching goals of your training program. Break these goals down into specific learning outcomes. Think about the **Knowledge, Skills, and Abilities (KSAs)** that learners need to acquire.
2. **Conduct a Needs Assessment:** Identify the knowledge gaps, skill deficiencies, and learning preferences of your intended learners. Understand what they need to succeed in their roles.
3. **Plan for Learning Styles and Modalities:** Recognize that adult learners have different needs than children. Motivate and teach based on the needs of adult learners. Additionally, consider different learning modalities such as auditory, visual, kinesthetic, or tactile.
4. **Harmonize Content:** Bring relevant content together like a symphony. Organize it thoughtfully to create a curriculum map or syllabus that outlines the sequence of topics and modules. This roadmap will guide learners on their educational journey.
5. **Resourceful Remix:** You don't need to reinvent the wheel! Tap into existing resources. Explore the Inform USA Training Manuals, Digital Content, and established Disaster Training. Remix and adapt these to craft a comprehensive curriculum that ensures success.
6. **Tech Integration:** Be tech-savvy! Teach learners not only how to use tools but also how to use them effectively. Leverage internal tech to design diverse learning experiences that cater to different styles and modalities.
7. **Strengthen Retention:** Learning sticks when reinforced. Imagine building a sturdy tower—one brick at a time. Create opportunities for knowledge gain, skill practice, and ability reinforcement. Multiple classes on the same subject? Absolutely! Each layer fortifies the foundation.
8. **Progress Assessment:** Illuminate the path of progress! Regularly assess both knowledge and skills. Blend formal (testing) and informal (observation or exercises) assessments. Formal assessments determine training completion and skill advancement, ensuring compliance and standards. But here's the star: quality assurance monitoring. Expose learners to QA during training, not after. Weave it into your curriculum like golden threads.
9. **Completion Seal:** Develop a process for trainers to sign off on learner completion. The form should showcase formal scores from testing and QA monitoring. Your center sets the success benchmark for graduation. The form? No narratives, just clear options: graduation, remedial support, extension, or termination. Share it with HR and supervisors—transparency is key. And hey, supervisors can peek at QA before graduation.
10. **Celebration Spotlight:** Cue the confetti! Graduation day—a celebration of achievement. Introduce graduates to the staff with a confident flourish. They've earned their stripes! Let them bask in the spotlight, knowing they've leveled up.

11. **Curriculum Evaluation:** Illuminate the path of progress! Regularly assess both knowledge and skills. Blend formal (testing) and informal (observation or exercises) assessments. Formal assessments determine training completion and skill advancement, ensuring compliance and standards. However, the most critical assessment lies in quality assurance monitoring. Expose learners to QA during training, not after. Integrate this into your curriculum.
12. **Trainer Assessment:** Feedback fuels growth! Evaluate trainers rigorously. Assess their effectiveness, pinpoint successes, and identify areas for improvement. Remember, trainers also evolve. Encourage them to pursue trainer certification—a badge of expertise.
13. **Post-Training Support:** Beyond supervisors, consider additional resources. Implement a mentorship program with seasoned staff. Peer-to-peer learning packs a punch. Just ensure no bad habits hitch a ride to the recruits.

Remember that a well-designed curriculum not only enhances the learning experience but also provides a solid foundation of knowledge and skills for learners to build upon during their tenure. Incorporate a mix of in-person and digital courses, offer self-paced options, and ensure immediate feedback to mimic your existing quality assurance process.

## Resources to Build Your Training Curriculum

A variety of resources are available to help you develop your training curriculum, keeping in mind the goal is to achieve certification and accreditation through Inform USA. You'll want to start by becoming an Inform USA Platinum member, which grants you access to all **training manuals**, live webinars, and certification-related **course content available through the Learn Platform**. From there, you'll also have access to the **Inform USA Networker** for a direct connection to Inform USA, as well as peer support from others seeking certification and accreditation.

### Inform USA Training Manuals

The Inform USA training manuals are a foundation for the art and practice of Information and Referral. Primarily designed for new staff, they are an integral part of Community Resource Specialists' and Database Curator onboarding and ongoing professional development.

These manuals include:

<a href="#">I&amp;R Onboarding Manual</a>	<a href="#">Training Community Resource Specialists</a>	<a href="#">Training Resource Database Curators</a>
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These manuals aid I&R practitioners seeking certification as either a Community Resource Specialist (CRS), a Community Resource Specialist – Aging/Disabilities (CRS-A/D), or a Community Resource Specialist – Database Curator (CRS-DC), and who want to reacquaint themselves with the knowledge, exercises, and tests before a re-certification exam.

When building your training curriculum, use these manuals as the starting point from which to develop your plan. These manuals contain standards and best practices when it comes to the practice of I&R and will be key to building and maintaining a quality 211 operation.



**NOTE: These manuals can be purchased either as a bundle or individually through Inform USA. They are free with your Inform USA Platinum Membership paid for by 211 Illinois.**

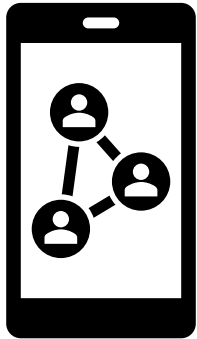
## Inform USA Learn

The Inform USA Learn platform allows your entire staff access to live webinars, certification preparation courses, and practice exams.

Below, you will find the recommended course tracks that will help onboard and prepare staff for certification as Community Resource Specialists (CRS) (those who handle Chat, Email, Phone, and Text Contacts) as well as Database Curators (CRS-DC). You will have access to the full catalog upon joining Inform USA as a platinum member.

## The Inform USA Membership Community

The Inform USA Networker is a networking community built exclusively for the information and referral professionals that make up the Inform USA Membership. This Facebook-esque platform allows for conversations, file sharing, announcements, and more. Here are a few ways you'll benefit as members of this community:



- Connect with peers facing similar opportunities and struggles,
- Post/search for jobs, funding opportunities, events, and best practices,
- Access uploaded templates and resources from the member community. It's a great place to find job descriptions, policies, and more; and
- Receive notifications to be the first to hear about time-sensitive opportunities and information.

## Additional Source Material

- I&R Introduction to Call Center Management
- I&R Outcomes Guide
- I&R Problem/Needs Guide
- I&R Resource Database Quality Guide
- I&R Style Guide
- Your Agency Training Manual
- Your Operational Policy and Procedure Manual
- Your Client/Contact Database Documentation
- Your Emergency Operations and Business Continuity Plans

# Inform USA Onboarding Courses

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## Community Resource Specialist Onboarding Track

Inform USA offers a series of progressive packages to help any person fulfilling the role of Community Resource Specialist. Upon successful completion, you will have obtained the skills and knowledge that provide a solid foundation as you continue to learn through practice and application. Start with the [Beginner Basic Package](#), and then proceed with [Beginner Plus](#) before finishing with the [Beginner Advantage Package](#). Note: Beginner Basic courses must be taken as prescribed; Beginner Plus and Beginner Advantage can be taken in any order.

### CRS Onboarding Package 1 – Beginner Basic

This package covers the essentials for those who are new to the I&R world and are beginning to understand what it means to be a Community Resource Specialist. This package includes an introduction to I&R, confidentiality, an overview of using the resource database to retrieve referrals, and ethics, values, and self-care. Note: courses should be taken in the prescribed order. Click the links to view full course info, objectives, and agendas.

- **COURSE 1: I&R Basics: Introduction to Information & Referral**  
This [course](#) includes an introduction to the Inform USA Standards and an overview of the various ways in which I&R services operate (it is appropriate for experienced I&R practitioners).
- **COURSE 2: Service Delivery: The Information & Referral (I&R) Process**  
This [interactive course](#) is for new staff at Information & Referral (I&R) organizations who will be responsible for handling I&R inquiries, for the supervisors who oversee this essential work, and for the existing staff needing to reacquaint themselves with key principles.
- **COURSE 3: Service Delivery: Confidentiality in I&R Services**  
This [course](#) is best for beginners in a Community Resource Specialist role who want to understand more about all aspects of client and confidentiality within an Information & Referral (I&R) environment, including those circumstances when confidentiality must be overridden.
- **COURSE 4: Service Delivery: Using the Resource Database for I&R Referrals**  
A resource database is a computerized body of information about community resources maintained by the I&R service. The resource database should include what you need to know about community, social, and health organizations to make good referrals by answering basic questions such as: What does the agency do? Who does it serve? When and how can people apply? What documents might an applicant need to produce? Who provides the service? This [course](#) will help Community Resources Specialists understand the basics of, and the strategies behind, effective database searches.
- **COURSE 5: I&R Basics: Ethics, Values & Self-Care**  
This [course](#) will help you understand how ethics play a part in the provision of I&R services in your organization and your community. Along with exploring your value system, this



course discusses the nature and implications of stress, stress management, and self-care, as well as setting healthy boundaries and expectations within I&R.

### **CRS Onboarding Package 2 – Beginner Plus**

After completing the Beginner Basics, this package helps new Community Resource Specialists deepen their skills and knowledge in empowerment and advocacy, crisis intervention, follow-up, dealing with challenging callers, and general customer service provision. This package also includes a course on understanding diversity and intersectionality. **These courses can be taken in any order.** Click the links to view full course info, objectives, and agendas.

- **Service Delivery: Crisis Intervention Within Information & Referral**

This [course](#) covers all aspects of crisis intervention within an I&R environment. Topics discussed include defining the nature of crisis, the search for coping mechanisms, and the types of crises encountered within I&R. It includes a crisis intervention model and the elements of a suicide risk assessment. The material is primarily geared toward front-line staff at I&R services. It is not appropriate for crisis specialists but may be a practical primer for other professionals within health and human services.

- **Service Delivery: Empowerment & Advocacy in Information & Referral**

Information and Referral is about much more than providing the “I” (Information) and the “R” (Referral). It is about empowering people to help themselves both now and in future situations, while it is sometimes also about advocating for people who are not currently able to help themselves. Empowerment and advocacy are fundamental principles of I&R. This interactive course is for Information & Referral (I&R) Specialists who handle human service inquiries from the public and the supervisors who oversee this essential work. The [course](#) describes the nature of empowerment (helping people to help themselves) and advocacy (when people really need additional support) within the context of I&R.

- **Service Delivery: Information & Referral Customer Service**

The core of your job is to help people – to “serve” them – to provide I&R customer service. A Community Resource Specialist may answer 100 calls in a busy day. But each of those calls is the most important call of the day for the person who makes it. The challenge is to respond to each of those 100 calls as if it were also the most important call of your day. Depending on organizational preferences and background, the people who contact I&R services may be referred to internally as “clients,” “inquirers,” “callers,” or “customers.” [This course is primarily for Community Resource Specialists.](#)

- **Service Delivery: Follow-Up**

Within I&R, follow-up is the process of contacting clients to determine whether their needs have been met because of the earlier referrals provided and, if not, why not. Depending on the circumstances of the situation and the client, a Community Resource Specialist may choose to follow up with the client to ensure that the primary need of the individual was met. This follow-up is not conducted for every client but is at the discretion of the specialist

and the policies of the I&R agency. This [course](#) will review the standards and requirements of the follow-up process.

- **Service Delivery: Responding Effectively to Challenging Calls**

Information and Referral (I&R) specialists answer calls from vulnerable people in difficult situations daily. With experience, they handle these calls quite adeptly. This course is about those other calls. An I&R specialist must have the skills to meet the needs of all types of people in all situations, including people who are angry, hostile, manipulative, frequently call with the same problem, or are otherwise difficult to serve. This [interactive course](#) describes the range of “challenging” calls encountered within an I&R program, techniques for diffusing situations, setting boundaries, and, if necessary, terminating calls. Note: This course is primarily for community resource specialists but can also be used for database curators who take calls.

- **I&R Basics: Serving Diverse Communities**

This [course](#) explores the concepts of cultural awareness and sensitivity, diversity awareness and intersectionality, and serving people from diverse backgrounds with respect and empathy. I&R agencies aim to serve everyone equally. Some people face ongoing systemic barriers to accessing services that relate to an ethnic/racial/religious/cultural background, which creates additional vulnerability. They may sometimes require more help because of that vulnerability. It is essential to act with positive respect toward people from all backgrounds and circumstances. Nothing less is acceptable.

### **CRS Onboarding Package 3 – Beginner Advantage**

This package helps Community Resource Specialists expand and round out their skills for serving special populations like the military, youth, and individuals with mental health disorders. It also explores the role of I&R in disaster preparation and response and how to apply your skills in the digital environment of chat and text. **These courses can be taken in any order.** Click the links to view full course info, objectives, and agendas.

- **Service Delivery: Chat & Text**

The ways in which people access Information & Referral (I&R) and other human services are changing – and changing rapidly. Clients want services that are accessible, flexible, and individualized to their preferences. I&R organizations and their staff need to deliver quality service using online chat and mobile texting technologies. This [course](#) will help human service providers identify the important considerations for setting up chat or mobile texting at their organization, including the components of chat and text software platforms. It will also assist I&R service providers in understanding the basics of professional communication in a text-based environment, including how to apply national Standards for I&R service delivery to chat and text. Special attention will be given to how to handle crises in a text-based environment.

- **Service Delivery: Serving Military Personnel & Their Families**

This [course](#) is for Information & Referral (I&R) Specialists who manage human service inquiries and need some additional knowledge and understanding to handle better issues involving U.S. military service members and their families. This interactive course will help an I&R professional to understand better military clients, what their needs are, some of their unique challenges (including the cycle of deployment and return), the military language they are speaking, and the resources that are available to help them.

- **Service Delivery: Serving People with Mental Health Disorders**

Despite increased awareness, there remains a stigma about mental health and a lack of understanding of what the term “mental disorder” really means in either a broad or a narrow sense. This [interactive course](#) provides general introductory information on mental health disorders and the services available to affected individuals. It is primarily intended for staff at Information & Referral (I&R) organizations that need the ability to handle a wide range of clients and disorders, including those involving mental health concerns. However, as a basic course, it is relevant to anyone within the human services sector who is not a specialist in mental health and related issues. This course is primarily for Community Resource Specialists.

- **Service Delivery: Serving Young People**

This [course](#) is primarily for Information & Referral (I&R) Specialists who are responsible for answering I&R inquiries and need the ability to handle a diverse range of service delivery, including calls from and concerning young people, the challenges young people face, and the services designed to help them. It outlines the issues faced by young people and the realities of communicating across a generation gap. The course describes the services that are available for all young people in addition to addressing some of the challenges confronted by at-risk youth. This course is not suitable for specialized youth workers. Also, differences in legal frameworks may make this inappropriate for Canadian I&R Specialists.

- **Service Delivery: LGBTQ+ Clients**

One of the most important factors to consider in conversations about diversity as it relates to sexual orientation, gender identity, and gender expression is self-determination. Self-determination refers to the process of deciding for oneself without outside influence. In this instance, self-determination refers to the idea that any external definitions may not reflect exactly how people define themselves. Sexual orientation, gender identity, and gender expression may carry different meanings for different people, like other personal identities like race/ethnicity or religion. All clients have the right to identify and define themselves as they choose. This [course](#) explores the context of and services for the special needs of those who identify as LGBTQ+.

- **I&R Basics: I&R Disaster Response**

I&R organizations need to be prepared to play an active role in disaster response. This [course](#) introduces the stages of a disaster and outlines the role an I&R may play in each stage. It also explores government and nonprofit organizations that typically respond to and are active in disasters and what resources they typically provide. This course also outlines steps that should be taken to prepare the organization, the technology (including the database), and the individual team members to respond during a stressful and ever-changing situation.

- **Service Delivery: Serving People with Disabilities**

Disability is the most equal opportunity minority: anyone can join at any time, and with enough time to grow old, most people will. This [course](#), designed primarily for the Community Resources Specialist (but still beneficial for the Database Curator), will explore legal definitions and laws around disabilities of all kinds, organizations, and services for people with disabilities and person and identity-centered language when collaborating with people with disabilities.

## **CRS-Database Curator Onboarding Track**

Inform USA offers a series of progressive packages to help any person fulfilling the role of CRS-Database Curator. Upon successful completion, you will have obtained the skills and knowledge that provide a solid foundation as you continue to learn through practice and application. Start with the [Beginner Basic](#) package before proceeding to the [Beginner Plus](#) package. Courses may be taken in any order.

### **CRS-DC Onboarding Packet 1 – Beginner Basic**

This package consists of six (6) courses essential to providing a foundation of success for Resource Database Curators. Begin with this package before moving on to the Beginner Plus Package. Click the links to view full course info, objectives, and agendas.

- **I&R Basics: Introduction to Information & Referral**

This [course](#) includes an introduction to the Inform USA Standards and an overview of the various ways in which I&R services operate (it is appropriate for experienced I&R practitioners).

- **Resource Database: Inclusions & Exclusions**

This [course](#) is best for beginners who are fulfilling a Database Curator role and want to learn more about the challenges of deciding what human service organizations and programs should be included in a resource database and which should be excluded, taking into account the practical reality of balancing the community needs of the resource database with the means available to maintain it effectively.

- **Resource Database: An Overview for Database Curators**

This [course](#) is best for beginners in the role of Database Curator, who will be responsible for the maintenance of resource databases. Database Curators in Information and Referral

(I&R) programs create and maintain community databases that detail the information that helps bring people and services together. This interactive course is for new staff at Information & Referral (I&R) organizations who will be responsible for the maintenance of resource databases. The course provides an overview of the activities of a Database Curator and an insight into some of the challenges of their position. Although they sometimes have different titles in different agencies, there are two main categories of staff within I&R organizations: Community Resources Specialists who work directly with clients and Database Curators who provide the information needed by the Community Resources Specialists and other community partners.

- **Resource Database: Structure & Style**

This [course](#) is best for beginners in the role of Database Curator who want to understand the structure of I&R Database records and the data elements within that structure. Being able to convey information that is clear, concise, consistent, and relevant is one of the most critical skills required by Database Curators who are responsible for the maintenance of human services databases in accordance with the Inform USA Standards and Quality Indicators for Professional Information and Referral (I&R). This interactive course covers the structure of I&R database records and the data elements within that structure. It outlines the style considerations for many of those elements while focusing on two of the most important yet challenging tasks confronted by a Database Curator: naming organizations and writing good service descriptions.

- **Resource Database: Introduction to Taxonomy & Indexing**

Although they sometimes have different titles in different agencies, within Information and Referral (I&R) organizations, there are two main categories of staff: (1) Community Resource Specialists who work directly with clients, and (2) Database Curators who provide the information needed by the Community Resource Specialists and other community partners. Both use the 211 LA County Taxonomy of Human Services. Database Curators use it to index database records, while Community Resource Specialists use it to retrieve database records to find accurate referrals for clients. The Taxonomy consists of over 11,000 fully defined terms covering all aspects of human services. This [course](#) outlines the structure of the Taxonomy, the different types of Taxonomy terms, and the principles of quality indexing that facilitate information retrieval.

- **Resource Database: Maintenance**

An Information and Referral (I&R) resource database must be accurate and responsive to the creation of new programs and the closure of existing ones. Database maintenance is a standards-driven requirement for I&R services. This [course](#) describes the resource database maintenance process, including ways of handling agencies that are not responsive to requests for information. It outlines activities that help I&R services keep up to date on changes in the various sectors of health and human services and stresses the importance of database security.

## CRS-DC Onboarding Packet 2 – Beginner Plus

This package consists of three (3) courses essential to a well-rounded introduction to your role as Resource Database Curator. Be sure to start with the [Beginner Basic](#) package before proceeding to the [Beginner Plus](#). Click the links to view full course info, objectives, and agendas.

- **I&R Basics: Serving Diverse Communities**

This [course](#) explores the concepts of cultural awareness and sensitivity, diversity awareness and intersectionality, and serving people from diverse backgrounds with respect and empathy. I&R agencies aim to serve everyone equally. Some people face ongoing systemic barriers to accessing services that relate to an ethnic/racial/religious/cultural background, which creates additional vulnerability. They may sometimes require more help because of that vulnerability. It is essential to act with positive respect toward people from all backgrounds and circumstances. Nothing less is acceptable.

- **I&R Basics: I&R Disaster Response**

I&R organizations need to be prepared to play an active role in disaster response. This [course](#) introduces the stages of a disaster and outlines the role an I&R may play in each stage. It also explores government and nonprofit organizations that typically respond to and are active in disasters and what resources they typically provide. This course also outlines steps that should be taken to prepare the organization, the technology (including the database), and the individual team members to respond during a stressful and ever-changing situation.

- **I&R Basics: Ethics, Values & Self-Care**

This [course](#) will help you understand how ethics play a part in the provision of I&R services in your organization and your community. Along with exploring your value system, this course discusses the nature and implications of stress, stress management, and self-care, as well as setting healthy boundaries and expectations within I&R.

## Inform USA Certification Tracks (CRS & CRS-DC)

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The Inform USA Certification Program is the premier professional credentialing program for individuals working within the Information and Referral (I&R) sector of human services. 211 Illinois encourages you to take full advantage of the resources and support offered through the Inform USA Learn platform, including onboarding/refresher courses, live webinars, and practice exams.

The [Inform USA Certification Program](#) is based on:

- established standards for the field of information and referral.
- a psychometrically based Job Task Analysis.

The program identifies specific competencies and related performance criteria, which describe the knowledge, skills, attitudes, and work-related behaviors needed by I&R practitioners to

execute their duties successfully. Certification is attained through the successful completion of a proctored examination and is maintained by documenting professional development hours.

Inform USA offers the following professional certifications:



**Community Resource Specialist (CRS)** This is designed for practitioners who collaborate directly with clients, whether on the phone or in person, and provide mediated information and referrals.



**Community Resource Specialist - Aging/Disabilities (CRS-A/D)** This is designed for practitioners who collaborate directly with clients and caregivers within the aging or disabilities area and perform the same basic range of skills and tasks as a comprehensive information and referral specialist.



**Community Resource Specialist - Database Curator (CRS-DC)** This is designed for practitioners who maintain databases of resources for the communities they serve.

## CRS Certification Track

This package is designed to help anyone preparing to take the CRS Certification test by reviewing portions of the training manual and standards that the certification exam is based on. Completion of this package does not guarantee a passing score on the test, nor does it qualify as a replacement for taking the test and grant the user certification. This package is for study purposes only. Most of the courses listed are part of the beginner/onboarding packages. New/additional courses noted with an asterisk (\*). Click here for detailed course information.

- CRS Assessment: Job Domains, Tasks, Skills & Knowledge Evaluation \*
- Service Delivery: Confidentiality in I&R Services
- Service Delivery: Crisis Intervention Within Information & Referral
- Service Delivery: Empowerment & Advocacy in Information & Referral
- Service Delivery: The Information & Referral (I&R) Process
- Service Delivery: Using the Resource Database for I&R Referrals

- Service Delivery: Follow-Up
- I&R Basics: I&R Disaster Response
- Service Delivery: An Overview of Person-centered Approaches and Techniques \*
- I&R Basics: Ethics, Values & Self-Care
- I&R Basics: Serving Diverse Communities

Want a quick review of the materials as a final prep for the big test? The [Certification Prep Package-Only the Tests](#) allows you to take these [review tests](#) as many times as you want.

Individual tests include:

- Confidentiality in Information and Referral
- Crisis Intervention within Information and Referral
- Empowerment and Advocacy in Information and Referral
- The Information and Referral Process
- Information and Referral Customer Service
- Using the Resource Database for I&R Referrals
- Follow-Ups
- I&R Disaster Response
- Ethics, Values, and Self-Care

Lastly, this package includes practice exams. This [practice exam for Inform USA Certification](#) as a Community Resource Specialist (CRS) consists of fifty questions, while the full exam contains one hundred questions. The questions are in the same format and weighed in the same proportion in the subject area as the full exam. Success in the practice exam does not guarantee success in the full exam, but it will provide you with some realistic preparation for the experience. Although this practice exam contains no questions specific to I&R within Aging and Disabilities, this is also a useful preparation for CRS-A/D candidates because of the overlap of questions between the CRS and CRS-A/D examinations. Please note that some of the questions within this practice exam might be using the "old" designation of an "Information and Referral Specialist" or a "CIRS."

## **CRS-DC Certification Track**

This package is designed to help anyone preparing to take the CRS-DC Certification test by reviewing portions of the training manual and standards that the certification exam is based on. Completion of this package does not guarantee a passing score on the test, nor does it qualify as a replacement for taking the test and grant the user certification. This package is for study purposes only.

- Resource Database: Inclusions & Exclusions
- Resource Database: Introduction to Taxonomy & Indexing
- Resource Database: An Overview for Database Curators
- Resource Database: Structure & Style
- Resource Database: Maintenance
- I&R Basics: Ethics, Values & Self-Care



- Inform USA Webinar: Maximum Interoperability: Imports, Exports, APIS, and Other Superheroes \*
- Inform USA Webinar: We Need to Talk About Data
- Inform USA Webinar: Multiparty Resource Data Management

Want a quick review of the materials as a final prep for the big test? The [Certification Prep Package-Only the Tests](#) allows you to take review tests as many times as you want.

Individual tests include:

- Inclusions and Exclusions
- Introduction to Taxonomy and Indexing
- An Overview for Database Curators
- Structure and Style
- Maintenance
- Ethics, Values, and Self-Care

Lastly, this package includes practice exams. This [practice exam](#) for the Inform USA Certification as a Community Resource Specialist - Database Curator (CRS-DC) examination consists of 50 questions, while the full exam contains 100 questions. The questions are in the same format and weighted in the same proportion in a subject area as the full exam. Success in the practice exam does not guarantee success in the full exam, but it will provide you with some realistic preparation for the experience. Please note that some of the questions within this practice exam might use the "old" designation of "CRS."

## Micro-Certification in I&R Coaching

Micro-certifications are short, competency-based courses that demonstrate mastery in a particular area. This [Inform USA credential](#) represents a special recognition for experienced I&R practitioners who complete the required curriculum and carry their digital badge. Micro-certifications are only available to holders of a core Inform USA Certification.



**The Coaching Micro-Certification** is for those persons who want to increase their coaching skills or are interested in learning more about what it takes to be an effective I&R coach and wish to advance their knowledge about coaching.

## Call Center Manager Certification Courses

**Call Center Manager Training Certification Course (RCCSP):** This certification [course](#) is five in-person days, or eight virtual half-days of instructor-led training, and includes a certification exam through the Resource Center for Customer Services Professionals (RCCSP) Professional Education Alliance. The RCCSP Call Center Manager Certification training course is ideal for new and experienced contact center supervisors, managers, and executives with call center oversight who wish to improve their skills and earn an internationally recognized certification.

You will learn the art and science of contact center management. Hone tactical skills you can utilize every day. Jump-start your center's improvement initiatives. And earn the industry's most prestigious credential. Attend the most popular management certification program in the call center industry. The curriculum focuses on comprehensive skills and knowledge necessary to manage a small, midsize, new, or challenged center. Course content covers tactical management responsibilities, from the most fundamental tasks of hiring, training, coaching, maintaining morale, forecasting, scheduling, and using performance metrics all the way through quality assurance, cost management, strategy, leadership, and more.

Each participant is put through the paces in this hands-on course, with self-assurance and confidence-building as instructional objectives. Hands-on tools, software, a forms library, benchmarks, and action plans used in class are packaged up for the participant to take back to the office so that newly learned skills and methods can be immediately applied.

## Disaster Preparedness Training

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Disaster operations and recovery are phases of emergency management that require a team effort at all levels of government and the private sector. Professionals involved in disaster operations and recovery include elected and appointed officials, city and county administrators, emergency managers, public works directors, building officials, community planners, emergency services personnel, and other allied professionals.

### NIMS (National Incident Management Systems) Courses

The National Incident Management System (NIMS) Training Program identifies courses critical to train personnel capable of implementing all functions of emergency management. This program establishes the [NIMS core curriculum](#) to ensure it adequately trains emergency and incident response personnel to all concepts and principles of each NIMS component. Here is a list of courses relevant to I&R work:

- [ICS-100: Introduction to the Incident Command System](#)
- [ICS-200: ICS for Single Resources and Initial Action Incidents](#)
- [IS-700: National Incident Management System, An Introduction](#)
- [IS-800: National Response Framework, An Introduction](#)
- [G-191: Incident Command System/ Emergency Operations Center Interface](#)
- [G-402 Incident Command System \(ICS\) Overview for Executives/Senior Officials](#)
- [E/L/G-2300 Intermediate Emergency Operations Center Functions](#)

### FEMA (Federal Emergency Management Association) Courses

The Emergency Management Institute (EMI) offers self-paced [courses](#) designed for people who have emergency management responsibilities and the general public. All are offered free of charge to those who qualify for enrollment. Here are some courses relevant to I&R work.

- [IS-288.A: The Role of Voluntary Organizations in Emergency Management](#)
- [IS-403: Introduction to Individual Assistance \(IA\)](#)
- [IS-505: Concepts of Religious Literacy for Emergency Management](#)

## Contact Centers Quality Assurance

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Each 211 Illinois Statewide Network Contact Center should have documented and implemented quality assurance processes where they monitor, rate, and review recorded or live conversations to ensure they meet quality benchmarks. This best practice should be paired with coaching to improve staff performance and raise the quality of the 211 Contact Center. Here are some webinars available through Inform USA on demand to guide your training curriculum development:

- [Inform USA Webinar - Quality Assurance 101 and The Basics of Team Alignment](#)
- [Inform USA Webinar - Facilitating a “Scathingly Brilliant” Quality Program](#)

Each 211 Illinois Statewide Network Contact Center should also have one that ensures the resource directory records are reviewed regularly. This best practice should be paired with AI grammar and spelling tools and coaching to improve staff performance, record consistency, and readability, and raise the quality of the 211 Resource Directory. Here are webinars related to data integrity:

- [Inform USA Webinar - Superheroes of Data Quality](#)
- [Inform USA Webinar - Database Style Guide Training and Quality Assurance Review of Resources](#)

## Contact Center In-Service Opportunities

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We encourage each 211 Illinois Statewide Network Contact Center to conduct in-service training around the systems of care in your community. Leverage the expertise of other health and human service organizations within your community to help further educate the 211 Contact Center Staff and Management.

Some ideas to focus on for your in-service might include:

- **Adult Protective Services/Child Protective Services:** Who is the mandatory reporter? What responsibility do 211 Contact Centers have when it comes to reporting abuse or neglect? What are the necessary referrals when this occurs?
- **Childcare Services:** What are the changes when it comes to childcare referrals? How does the grading system in the State of Illinois work when referring individuals to childcare centers? Are there specific guidelines in place when making an informed referral to designated childcare services for children who are disabled or mentally ill?
- **Crisis Services:** Who are the main crisis/suicide service providers in the state? How should we be making appropriate referrals to these entities? Are there approaches that we can all learn from when handling these contacts? Are there assessment guides that we can all share?
- **Homelessness Prevention Services:** What are the changes when it comes to overall systems of care? How does HMIS assist clients and providers alike? Are there changes in the overall service array, or has there been a shift in funding?
- **Mental Health Services:** Are there changes in confidentiality policies? How do each of the 211 Contact Centers align when it comes to their confidentiality policies or processes? Are there new systems of care available for the mentally ill or developmentally disabled that may not be included in current referrals to individuals contacting the centers?
- **Military Services:** Who are the main providers in the state of Illinois when dealing with military members or family members of those who are serving our country? Are there different training methods that should be implemented into current operations?

- **Senior Services:** Who are the main providers in the state of Illinois when dealing with the aging or seniors? Are there different training methods that should be implemented into current operations? What can we do to help partner with these entities that work with the aging community to enhance services?