ADMINISTRATION FOR CHILDREN & FAMILIES

2017 National LIHEAP Conference

LIHEAP Intake Staff Training

Facilitator Guide

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LIHEAP Intake Staff Training

This session of the LIHEAP Conference is a scenario-based session that focuses on some of the key ways to train and work with subgrantees. This session is highly interactive and will take approximately 75 minutes.

Materials Needed	
Presentation	LIHEAP Intake Staff Training Presentation (Microsoft PowerPoint File)
Handouts	Handout 1: LIHEAP Intake Staff Notes – for the participants to take notes about the various discussion questions and scenarios Handout 2: LIHEAP Intake Staff Scenarios – scripts for the role-play activities Handout 3: LIHEAP Intake Staff Sample Application – for use during the crises section

Moderator: Kate

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Introduce participants to the session. Explain that we will discuss some of the key ways to work with subgrantees and the participants' teams for the LIHEAP program. We will look at the process from initial contact to awarding benefits.

Distribute Handout 1: LIHEAP Intake Staff Notes.

State: I am giving you a handout that you can use to take notes during the session today.

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Review the agenda on Slide 2.

Topic 1: Training

Time Needed:	15 minutes
Objective:	This section will introduce best practices for training subgrantees and staff.
Procedure:	The facilitator will take the role of a trainer and pretend the participants in the conference are the subgrantees.

Facilitator: Patrice

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Explain: We are going to start by discussing how to conduct training for your subgrantees and staff. I will read a quick training session for you, and then we can discuss what you thought worked and what did not work. I will run through a quick training session for you.

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State: I am here today to explain how to handle the funds available from LIHEAP for people who need assistance. I am sure you are all familiar with the program, so I will not rehash everything for you now. As you know, these funds are available for people who need assistance with energy costs. I have a handout for you that covers all the circumstances that are approved. Of course, you have to do the work to determine eligibility and the amounts.

I'm sure you will do just fine in handling this money. If you have any questions later, please let me know. Thanks for your attention!

[Display Slide 5]

Ask: What went well with the training?

Listen for answers that include having a handout available and having an introduction.

Ask: What did not go as well with the training?

Listen for answers that include the following:

- Not going into details
- Not providing hands-on training time
- Not having time for questions

Ask: What should have happened in the training?

Listen for answers that include the following:

- Have a structured outline to follow for the training
- Do not assume the participants all are familiar with the program
- Go through the steps one by one
- Give the participants time for hands-on practice
- Do activities to ensure the participants "get it" (e.g., informal assessments)
- Allow time for questions

Ask: What have you done in your training that has worked well for you?

Allow participants 5 - 7 minutes to share ideas.

State: We have created a list of best practices for training. This list will be on your USB drive as a reference.

Topic 2: Initial Contact

Time Needed:	20 minutes
Objective:	This section will review rules and practices surrounding initial contact.
Procedure:	Volunteers will play the role of the subgrantee dealing with an initial contact with a caller. The facilitator will play the role of the caller. There are three separate scenarios with scripts for the volunteers.

Facilitator: Akm

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Ask the class for three volunteers to play the role of the subgrantee answering a call for the initial contact. Explain that Patrice will play the role of the caller.

Distribute Handout 2: LIHEAP Intake Staff Scenarios to the three volunteers (one script each).

Role-play Scenario 1.

[Display Slide 7]

Ask: Was that the correct way to handle the call? Why or why not?

Allow participants 2 - 3 minutes to respond.

Answer: This is not correct. You never tell the caller that he or she cannot apply. Even if there is a wait list, you should offer the caller a chance to submit an application or get on a list, in case more money becomes available in the future, or at least to keep track of the need in the community. If the caller is discouraged from applying, that could deny him or her equal access to the program. If you deny an applicant over the phone, then the applicant also needs to be informed of his or her right to appeal or request a fair hearing.

Role-play Scenario 2.

Ask: Was that the correct way to handle the call? Why or why not?

Allow participants 2 - 3 minutes to respond.

Answer: This is not correct. Look for answers that include the following:

- The caller appears to be in a crisis and needs help now.
- The caller should have been given the information on how to file an application, where to go for additional information, how to get immediate help, the hours the office is open, etc.
- Grantees are also encouraged to have a list of referral or partner agencies for the client while waiting for the approval of the benefits processing of the application. (This is where Assurance 16 works.)

Role-play Scenario 3.

Ask: Was that the correct way to handle the call? Why or why not?

Allow participants 2 - 3 minutes to respond.

Answer: This is correct. Look for answers that include the following:

- The caller was made aware of the options for applying.
- The process was explained.

Note: The response time needed may vary depending on whether this is actually a crisis or not.

[Click Slide 7 to reveal another question]

Ask: How do you handle callers when there is no money available?

Allow participants 2 - 3 minutes to respond.

[Click Slide 7 to reveal another question]

Ask: Do you train your subgrantees or staff on phone etiquette?

Allow participants 2 - 3 minutes to respond.

Topic 3: Crises

Time Needed:	20 minutes
Objective:	This section will discuss how different groups define "crises."
Procedure:	Groups will review the sample application and determine if this qualifies as a crisis.

Facilitator: Patrice

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State: After the initial contact, the next step is to review the completed application and determine eligibility. We are not going to spend any time on that in this session. Instead, we will spend time discussing what constitutes a crisis.

[Display Slide 9]

Explain: There is no formal definition for crisis. The states have the discretion to develop their own definitions, so grantees may vary in how they define an energy crisis and establish eligibility criteria. Many consider lack of home energy as the key criterion. In these cases, applicants must have a pending or actual disconnection of their utility bill, or, in the case of delivered fuel, have a near empty or empty fuel tank. If an applicant's heat is included in the rent, an eviction notice is required.

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State that LIHEAP Section 2604 specifies the time frames for responding to a crisis. You must respond within 48 hours to resolve the situation or within 18 hours if it is a life-threatening situation.

Explain: We are going to give you a chance to review an application and determine the crisis status.

Ask the participants to form groups of 3 - 4 people.

Distribute the Handout 3: LIHEAP Intake Staff Sample Application.

[Display Slide 11]

Ask the groups to review the application and discuss if this would be considered a crisis in their programs. Ask the groups to compare how each one defines a crisis. Also, ask them to discuss how they calculate the time frame for response. Does it start when the person makes an initial contact? Or, does it start when the application is completed?

Allow the groups 15 minutes to discuss.

Ask: What did you learn from the others in your groups? Did anyone have anything really surprising?

Allow participants 2 - 3 minutes to discuss.

[Click Slide 11 to reveal another question]

Ask: What if the person in the scenario indicated his or her heat was already turned off? Does that make a difference?

[Click Slide 11 to reveal another question]

Ask: What do you do to facilitate an application on a priority basis? (Note: Some may have open slots during the day to deal with priorities, or have a dedicated staff person for crises.)

[Click Slide 11 to reveal another question]

Ask: Do any of you have a specific procedure for temporary shelter until the heat is restored?

Ask: What changes to the application could improve the intake process?

Topic 4: Discussing Benefits

Time Needed:	15 minutes
Objective:	This section will discuss handing difficult situations.
Procedure:	A volunteer will role-play a difficult situation with the facilitator.

Facilitator: Akm

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State: One important step in the process is explaining the benefit amount to be paid.

Ask a volunteer to help you role-play.

Provide a copy of the script (Handout 2: Intake Staff Scenarios) to the volunteer. Patrice will explain the benefit amount available (demonstrating good listening/emotional intelligence). The volunteer will play the person getting the benefit, who is not happy about the amount. The situation will become emotionally charged.

Role-play the scenario. (Demonstrate an appropriate level of compassion and touch.)

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Ask: What did Patrice do well? What should she have done differently?

Allow participants 2 - 3 minutes to respond.

[Click Slide 13 to reveal another question]

Ask: What kind of training do you offer your subgrantees or staff to help them deal with situations like this?

Allow participants 2 - 3 minutes to respond.

[Click Slide 13 to reveal another question]

Ask: What kind of training do you offer you subgrantees or staff to deal with the emotional side of things? How do they handle people who get emotional or upset?

Allow participants 2 - 3 minutes to respond.

[Click Slide 13 to reveal another question]

Ask: What do you tell your subgrantees or staff about boundaries?

Allow participants 2-3 minutes to respond.

[Click Slide 13 to reveal another question]

State: It is important to remember the boundaries when you are talking to the applicants. You should not hug or touch them, except maybe on the shoulder.

Ask: Do your subgrantees or staff have information available on other sources of aid, or other places to which they can turn if needed?

Allow participants 2 - 3 minutes to respond.

State: It is very helpful to have information about referrals and other agencies that can help. It is great if you can form partnerships using Assurance 16. Make these resources available to the staff in order to provide the best resources and help for the community.

Closing

Time Needed:	5 minutes
Objective:	Close the presentation.
Procedure:	Take time for additional questions or comments.

Facilitator: Akm

[Display Slide 14]

State: Thanks for attending the session today. We covered a lot of material.

[Display Slide 15]

Review the summary on slide 15.

[Display Slide 16]

Ask: What questions do you have?

Allow several minutes for any last questions or comments.

State: One of the best things you can do for your subgrantees and staff is to provide the needed training so they can be successful handling the LIHEAP program funds!

Thank the participants for attending the session.