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ABSTRACT

A good resource file will enable information and referral (I & R) center personnel to serve requests for information quickly and correctly. This is especially important for centers which are staffed by non-professionals, volunteers, and part-time people. The proper resource file has three important qualities: (1) it is complete (it includes information on all community resources); (2) it is up-to-date (the entries are updated regularly); (3) it is well-organized (its categories and index help the user find what he is looking for, quickly and without wasted effort). This manual discusses the following aspects of resource files: (1) Planning a Resource File; (2) Obtaining Information by Personal Interview; (3) Obtaining Information by Mail; (4) Contacting Private Practitioners; (5) Processing the Information to Create a Resource File; (6) Recruiting Help to Prepare the Resource File; and (7) Keeping the Resource File Current. (Other manuals in this series are available as LI 003187-003188 and LI 003190 through LI 003195). (Author/NH)

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Information and Referral Services:

THE RESOURCE FILE

(Working Draft)

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U. S. DEPARTMENT OF HEALTH,
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Nicholas Long, Ph.D.
Project Director
February 28, 1971

Chapter 1: Introduction

A good Resource File will go a long way toward making your I & R center an outstanding community asset. It will enable center personnel to serve requests for information quickly and correctly. This is especially important in the case of centers which are staffed by non-professionals, volunteers, and part-time people. A well-developed Resource File allows these people to handle inquiries as effectively as if they were experienced and professional I & R workers.

Most part-time non-professional and volunteer staff workers enter the scene only after the Resource File has been prepared. If the File is a good one, then learning to use it and to handle inquiries comes naturally, and very quickly.

The proper resource file has three important qualities.

1. It is complete (it includes information on all community resources).
2. It is up-to-date (the entries are updated regularly).
3. It is well-organized (its categories and index help the user find what he is looking for, quickly and without wasted effort).

Planning

A good Researce File is easier to use, and is more helpful, and requires careful planning in advance. Planning and preparing a proper Resource File for your community will require a lot of work. To do the job well will take time, patience, and hard work. There will be a lot of paperwork, and you will have to visit many of the community agencies and organizations to obtain the information needed for the file.

How Long Will it Take?

It will ordinarily take two full-time persons (or their equivalent in part-time persons) three to six months to prepare a Resource File for a moderate-sized community. Most of that time will be spent visiting larger community service agencies and organizations and becoming familiar with their activities and their personnel. In between visits you will be kept busy processing the information you have already collected, and preparing sections of the Service and Agency Files.

After the first three or four weeks you may find yourself growing impatient, and anxious to get on with the business of serving the community. It may seem to you that you are already adequately familiar with your community and with what it has to offer. Not so. It is very important that your plan for preparing a complete Resource File be carried out for the full period of time budgeted for it. It makes no sense to skip a visit to an important community service, and then to wrongly refer some elderly person to that service, or to remain unaware of its value. It is your job to find out about the service, not that of your clients.

Opening the I & R Center to the Public

After two or three months you will recognize that you have apparently already covered all the major service organizations in your community. You will be spending more time now finding out about smaller organizations, private practitioners and partnerships, and organizations which only occasionally serve the elderly. At this point it may be wise to assemble a first edition of the Resource File and open the I & R center to the public. You will probably find that for the first few weeks after the center is open only a small number of persons will be making inquiries. It takes time for news about the center to make its way through the community, especially in the case of a center serving the elderly. During these several weeks you will still be able to devote a fair portion of your time to developing the Resource File. Gradually, as business picks up, you can phase in your information service to the public and phase out the development of the Resource File.

Keeping the Resource File Current

The job of maintaining the Resource File is never finished. As you process inquiries you will continue to learn new things about your own community and its services. You must be prepared to capture this information and enter it in all the copies of the Resource File. From time to time you will find it useful to check back with agencies and organizations and update your Resource File with new information. Later in this chapter we will describe procedures for keeping the Resource File up-to-date and complete. But first we turn to a detailed discussion of how to prepare a new Resource File, from scratch.

Chapter 2: Planning a Resource File

Plan Ahead

It is important that the Resource File be planned well before you begin the process of visiting community organizations. Proper planning will save you hours of wasted visits and paper work. Good planning will also reduce the occasional need to contact an agency a second time to obtain information that did not appear necessary during the initial visit. Each hour of careful planning will return a savings of <u>many</u> hours of unnecessary work, wasted effort, and painful embarrassment. Planning simply cannot be overemphasized.

Unless you have already had substantial experience with I & R centers and with other community Resource Files, you may well feel uncertain as to exactly what should be included in the Resource File and what should be excluded. How does one identify all the agencies and organizations who serve the elderly in a given community? What will one need to know about each agency? Which agencies must be visited in person and which can be handled by mail? How does one organize all this information so as to make the file most useful? What categories should be used? How detailed should the Resource File be?

These decisions are each significant, in that the value of the Resource File depends on exactly what information it contains and on how that information is arranged. If the wrong planning decisions are made, then the Resource File will not be nearly as useful as it might otherwise have been. What we try to do below is plan with you details of a good Resource File that can be developed for most any new I & R center. The Resource File described below is based on the experiences of many of the several hundred I & R centers now operating in the United States. It has been adapted so as to be especially useful to an I & R center serving the elderly.

To be sure, the Resource File that will be developed for your I & R center will be uniquely designed for the needs and assets of your own community. Yet, if that Resource File develops from the plan presented below, your Resource File will benefit from the considerable experience of other persons who have already gone through this process. Use the materials and forms given in the next several pages as an outline for planning your own Resource File. Until your own experiences suggest that certain changes will make your I & R center a more effective one, we urge you to use the forms and procedures below as guides to developing the Resource Rile. Before changing the forms for your center, discuss this matter with your field representative from the state I & R net work office.

Step 1: Categories for the Service File

The Service File is arranged by service categories. Under each category are listed the names of all community agencies and organizations offering that service. A list of suggested categories for a Service File is given in Table 1.

Table 1: Suggested Categories for the Service File

1. FINANCIAL SERVICES

1A. Financial Assistance

- 1A.1 Emergency
- 1A.2 Monthy Cash grants
- 1A.3 Material assistance: food, clothing & shelter (in-kind)
- 1A.4 Food Stamps
- 1A.5 Food Commodities

1B. Financial Insurance

- 1B.1 Social Insurance (i.e. Social Security)
- 1B.2 Private Insurance

1C. Pensions and Benefits

None

1D. Housing Assistance - financial

- 1D.1 Rent subsidies
- 1D.2 Mortgages subsidies
- 1D.3 Home improvement loans
- 1D.4 Home relocation loans

1E. Medical Assistance - financial

- 1E.1 Medicare
- 1E.2 Medicaid
- 1E.3 Other Financial Aid

1F. Employment

- 1F.1 Job information
- 1F.2 Job counseling
- 1F.3 Job finding

1G. Other

None

2. HEALTH - general & mental health

2A. Community Health Services

- 2A.1 Communicable disease control
- 2A.2 Community health supervision & education programs
- 2A.3 Food, water & housing inspection

2B. Home - health services

- 2B.1 Visiting nurse services
- 2B.2 Physicians home visits
- 2B.3 Prescription deliveries
- 2B.4 Homemaker service
- 2B.5 Shopping service
- 2B.6 Housekeeping services
- 2B.7 Oldster sitting
- 2B.8 Companion services
- 2B.9 Other

2C. Community Health Care

- 2C.1 Emergency services
- 2C.2 Drugs
- 2C.3 Dental
- 2C.4 Day Care
- 2C.5 Individual & family counseling
- 2C.6 Group therapy
- 2C.7 Psychological diagnosis and testing
- 2C.8 Ear, eye, nose, throat exams and treatment
- 2C.9 Physical exam
- 2C.10 Outreach

2D. In-Patient Health Care (acute and chronic)

- 2D.1 Emergency service
- 2D.2 24 hour nursing & boarding care
- 2D.3 Drugs
- 2D.4 Medical care

2D.5 Use of special equipment
2D.6 Physical therapy
2D.7 Individual and Family counseling
2D.8 Social activities
2D.9 Other

2E. Supportive Services

2E.1 Medicaid
2E.2 Insurance including Medicare
2E.3 Prosthetics
2E.4 Medical Information & Referral Services

2F. Services for Chronic Conditions

2F.1 Alcoholism
2F.2 Arthritis
2F.3 Blindness
2F.4 Cancer
2F.5 Deafness
2F.6 Diabetes
2F.7 Heart
2F.8 Stroke
2F.9 Other

2G. Death Related Services

2G.1 Death Certificates
2G.2 Funeral Services
2G.3 Wills
2G.4 Autopsies
2G.5 Religious Counselings
2G.6 Individual and family counselings

3. HOME

3A. Homemaker Service

3B. Shopping Service

3C. Meals on wheels

3D. Housekeeping Service

3E. Companion and Sitting Service

3F. Friendly visiting service

3G. Visiting Nurse Service

3H. Home Maintenance System

4. HOUSING

4A. Residential Housing Arrangements and Services

4A.1 Emergency Housing
4A.2 Boarding Home Care
4A.3 Nursing Home Care
4A.4 Retirement Housing
4A.5 Low-rent Housing

4B. Housing-Related Services

4B.1 Rental Assistance
4B.2 Home Purchasing & Selling
4B.3 Financial Services
4B.4 Low Cost Home Loans
4B.5 Mortgages
4B.6 Mortgage Subsidies
4B.7 Home -- relocation loans
4B.8 Insurance
4B.9 Rent Subsidy
4B.10 Legal Services
4B.11 Housing Information & Referral Service

4C. Community Housing Regulation Services

4C.1 Standard setting and Licensing
4C.2 Zoning
4C.3 Housing Code Enforcement

4D. Other

None

5. LEGAL

5A. Consumer Protection

5B. Protective Services

5B.1 Commitment
5B.2 Guardianship

5C. General Legal

5C.1 Mortgages
5C.2 Wills
5C.3 Divorce
5C.4 Legal Information & Referral
5C.5 Other

6. LEISURE TIME ACTIVITIES

- 6A. Adult Education Programs
- 6B. Special Interest Activities
- 6C. Social Activities
- 6D. Cultural Programs
- 6E. Volunteer Activities
- 6F. Travel
- 6G. Recreation
- 6H. Other

7. PERSONAL SOCIAL SERVICES

- 7A. Individual and Family Counseling
- 7B. Group Therapy
- 7C. Psychological Testing, diagnosis and Evaluation
- 7D. Day Care Programs
- 7E. Various Leisure Time Activities
- 7F. Information and Referral Services on Personal Problems
- 7G. Residential (Nursing Home) Care Under non-medical auspices
- 7H. Volunteer Services
- 7I. Vocational Counseling
- 7J. Other

8. SPIRITUAL

9. TRANSPORTATION

- 9A. Ambulance
- 9B. Taxi Service
- 9C. Public Transportation
- 9D. Special Transportation Services

10. MISCELLANEOUS

- 10A. Taxes
  - 10A.1 Real Estate
  - 10A.2 Income: federal, state & local
  - 10A.3 Auto
- 10B. Emergencies
  - 10B.1 Police Protection
  - 10B.2 Fire Protection
  - 10B.3 Health
  - 10B.4 Social
- 10C. Generalized Information and Referral Services

Step 2: Identifying all the Agencies, Organizations, and Individuals that Provide Services to the Elderly in your Community in the Suggested Categories

Next, it will be necessary to identify and list all the agencies and organizations that ought to be included in the Resource Rile. The kinds of agencies within each of the categorized service areas that are likely to provide the above categorized services are identified in Table 2. They have been subdivided into four common types: Governmental; Voluntary; Non-Profit; and Private Individuals.

A. Use this Table together with the Yellow Pages in the Telephone Book to help you compile the list of specific agencies to be included in the Resource File. In many cases the Yellow Pages categorizes services under identical or similar headings as those listed in Table 1. The Yellow Pages will supply you with the names, address and phone numbers of agencies and organizations that you will want to include in the Resource File.

B. Transfer this information onto 3x5 index cards and alphabitize according to agency name to avoid duplication, since the Yellow Pages often lists agencies in many places under many different headings. The Service File will also. However, you will want to contact an agency only once for the information you need while you are developing the Resource File. Therefore it is important that it not be identified more than once at this time. Later these cards may be used for a cross reference index file when the Resource File is completed with a designated number to match its service file number. This numbered card will be filed alphabetically, of course.

Table 2: Agencies Serving Elderly in Suggested Service Categories

1. FINANCIAL

1A. Government

- 1A.1 Department of Labor (or Manpower)
- 1A.2 Welfare Agencies
- 1A.3 Social Security
- 1A.4 Disability Insurance
- 1A.5 Verteran's Administration
- 1A.6 Tax Bureaus

1B. Voluntary -Non-Profit Agencies

- 1B.1 Social Service Agencies
- 1B.2 Churches
- 1B.3 Civic & Community Service Organizations

1C. Private Organizations & Companies

- 1C.1 Banks & Credit Unions
- 1C.2 Employment Offices
- 1C.3 Insurance Companies
- 1C.4 Relief Organizations
- 1C.5 Stock and Mutual Fund Brokers
- 1C.6 Unions
- 1C.7 Loan Companies, pawn shops
- 1C.8 Credit Card Companies
- 1C.9 Better Business Bureau, Credit Bureaus, Collection Agencies

1D. Private Individuals

None

2. HOUSING

2A. Government

- 2A.1 Health Departments
- 2A.2 City Planning Departments
- 2A.3 Highway Departments
- 2A.4 Welfare Departments
- 2A.5 Mayor's Office
- 2A.6 Public Shelters
- 2A.7 Refuse Collection
- 2A.8 City Housing Authority
- 2A.9 Emergencies - Police, Fire, Ambulance, etc.

2B. Voluntary Agencies (Non-Profit)

- 2B.1 Social Service Agencies
- 2B.2 Churches
- 2B.3 Civic & Community Service Organizations

2C. Private Organizations & Companies - (Profit)

- 2C.1 Utility Companies
- 2C.2 Repairs (see yellow pages) under type: roof, tree, plumbing, painting, etc.
- 2C.3 Shelters
- 2C.4 Boarding Houses
- 2C.5 Nursing Homes
- 2C.6 Hotels
- 2C.7 Motels
- 2C.8 Real Estate Agencies
- 2C.9 Refuse Collection

2D. Private Individuals

- 2D.1 Attorneys

3. HEALTH

3A. Government

- 3A.1 Health Departments
- 3A.2 Hospitals
- 3A.3 Mental Health Clinics
- 3A.4 Health Clinics
- 3A.5 Dental Clinics
- 3A.6 Welfare Agencies
- 3A.7 Social Security
- 3A.8 Emergencies: Police, Fire, Ambulance, etc.

3B. Voluntary - Non-Profice Agencies

- 3B.1 Health Clinics
- 3B.2 Social Service Agencies
- 3B.3 Hospitals

3C. Private Organizations & Companies (Profit)

- 3C.1 Drug Stores
- 3C.2 Mental Health Clinics
- 3C.3 Health Clinics
- 3C.4 Dental Clinics
- 3C.5 Homemaker Services
- 3C.6 Nursing Services
- 3C.7 Professional Associations
- 3C.8 Specialized Health Associations.

3D. Private Individuals

- 3D.1 Physicians
- 3D.2 Dentists
- 3D.3 Ophthalmologists

4. LEGAL

4A. Government

- 4A.1 City & State Attorney's office
- 4A.2 Human Rights Department
- 4A.3 Sheriff's Department
- 4A.4 Police Department

4B. Voluntary (Non-Profit Agencies)

- 4B.1 Legal Aid

4C. Private Organizations and Companies

None

4D. Private Individuals

- 4D.1 Attorneys
- 4D.2 Bar Association

5. TRANSPORTATION

5A. Government

- 5A.1 Bus
- 5A.2 Ambulance
- 5A.3 Subway
- 5A.4 State Motor Vehicle Office
- 5A.5 Police

5B. Voluntary- Non-Profit Agencies

- 5B.1 Social Services Agencies
- 5B.2 Churches
- 5B.3 Civic & Community Service Organizations

5C. Private Organizations & Companies

- 5C.1 Airport
- 5C.2 Airline Companies
- 5C.3 Automobile Rental
- 5C.4 AAA
- 5C.5 Automobile Service
- 5C.6 Ambulance
- 5C.7 Bus
- 5C.8 Handicabs
- 5C.9 Rentals, not car
- 5C.10 Taxicabs

5D. Private Individuals

None

6. HOME HELP

6A. Government

- 6A.1 Welfare Agencies
- 6A.2 Health Department
- 6A.3 Emergencies: Police, Fire, Ambulance, etc.

6B. Voluntary (Non-Profit Agencies)

- 6B.1 Social Service Agencies
- 6B.2 Churches
- 6B.3 Community Services Organizations

6C. Private (Profit Agencies)

- 6C.1 Prosthetis
- 6C.2 Rentals (Wheel Chairs, Beds,etc.)
- 6C.3 Baby-sitting agencies

6D. Private Individuals

- 6D.1 Nurses
- 6D.2 Nursing Associations

LEISURE TIME ACTIVITIES

7A. Government

- 7A.1 Public Schools
- 7A.2 Colleges
- 7A.3 Parks
- 7A.4 Libraries

7B. Voluntary (Non-Profit Agencies)

- 7B.1 Colleges
- 7B.2 Libraries
- 7B.3 Museums & Galleries
- 7B.4 Auditoriums and Exhibition halls
- 7B.5 Senior Centers and Clubs
- 7B.6 Community Centers

7C. Private (Profit Agencies)

- 7C.1 Motion Picture Theaters
- 7C.2 Theaters
- 7C.3 Travel Agencies and AAA

7D. Private Individuals

None

PERSONAL SOCIAL SERVICES

8A. Government

- 8A.1 Public Welfare Agencies
- 8A.2 Mental Health Centers
- 8A.3 Employment Agencies (U. S. Employment Office)

8B. Voluntary (Non-Profit Agencies)

- 8B.1 Social Service Agencies
- 8B.2 Community Centers
- 8B.3 Churches
- 8B.4 Civic & Community Organizations
- 8B.5 Mental Health Clinics

8C. Private (Profit Agencies)

- 8C.1 Mental Health Clinics
- 8C.2 Employment Agencies

8D. Private Individuals

- 8D.1 Psychiatrists
- 8D.2 Psychologists
- 8D.3 Social Workers
- 8D.4 Local National Association of Social Workers Chapter
  Local American Psychological Association
  Local Psychiatric Association of the Medical Association

9. SPIRITUAL

9A. Government

None

9B. Voluntary (Non-Profit Agencies)

- 9B.1 Churches

9C. Private (Profit Agencies)

None

9D. Private Individuals

- 9D.1 Ministerial Association

10. MISCELLANEOUS

10A. Government

- 10A.1 City Assessor
- 10A.2 Internal Revenue Dept.
- 10A.3 Real Estate Offices
- 10A.4 State Dept. of Taxation
- 10A.5 City Hall
- 10A.6 Elector Offices
- 10A.7 Post Offices
- 10A.8 Emerigencies: Police Fire, Ambulance, Welfare, Hospitals, Public Health Dept., etc.

10B. Voluntary (Non-Profit Agencies)

- 10B.1 Social Service Agencies
- 10B.2 Hospitals & Clinics
- 10B.3 Ambulances

10C. Private (Profit Organizations)

- 10C.1 Ambulances

10D. Private Individuals

- 10D.1 Doctors
- 10D.2 Medical Association

The cards will look something like this eventially:

> 8B.1 Senior Citizen Center of Greater Mpls.
>
> 1505 Park Avenue
> Minneapolis, Minnesota
> (612) 339-7581

C. Inquire at two or three important agencies. There are bound to be in your community several individuals who are already familiar with many of the local resources. In many cases, there may already be available lists of local resources. By all means get in touch with several of these people and find out what is known and available. These lists, however, should be used to supplement and not substitute for the lists you are developing. Your best contacts will be made at the County Welfare Department, the Health and Welfare Planning Council, the Chamber of Commerce, the Park Board and the Nursing Home Association.

Step 3: Obtaining Information for the Agency File from all the Agencies and Organizations Identified in Step 2

The preferred method of obtaining this information is, of course, the personal interview. Personal interviews invariably yield the best results: more information, better information, closer familiarity with the agency, and an initial friendly and personal contact with agency personnel. The personal interview also allows you an opportunity to inform some of the agency staff of your plans and to convince them of your sincerity and desire to cooperate without infringing on the agency's own activities. A personal interview with an agency director in his own setting will give you an opportunity to make observations about his agency's special interests and services.

The list of organization names collected in Step 2 will be the guide to the agencies you should be contacting for information. You will find, of course, that the list is a rather lengthy one. It will be impossible to arrange personal interviews with all the agencies on the list. In many cases it will therefore be necessary to inquire for information by mail. In yet other, less important, cases your time and personnel budgets will make it impossible to obtain any additional information.

In order to plan your school for the next few weeks, you will have to determine which organizations on your list ought to be visited in person, which can best be contacted by mail, and which should be ignored other than for recording their names. (This third category will usually contain the names of the professional individuals (doctors, lawyers, pharmacists, dentists, etc.) in your community, for it will be impossible to contact each and every one of them. Occasionally, however, you will hear of an individual who specializes in working with the elderly. You may want to contact these specialists, probably by mail. However, your best procedure is to work with the local professional associations, such as the Medical Society and the Bar Association.)

Sort your list of community resources into the three categories: personal visit, mail contact, and no contact. The following important types of agencies ought to be included in the personal visit category:

Government Agencies

- Welfare Department
- Social Security Agency
- Department of Health
- Veterans' Administration
- Hospitals and mental health centers (includes private)
- Clinics (includes private)
- Mayor's Office
- Police Department
- City or County Attorney's Office
- Park or Recreation Department
- State Employment Agency
- Public Housing Authority
- Housing Communities for the Elderly

Private Organizations

- Community Centers, Senior Centers, Church Centers
- Local Medical, dental nursing, social worker, pharmaceutical, and legal associations.
- Voluntary Agencies and groups
- Legal Aid Society
- Community Emergency or Rescue Organization
- Retirement Organizations
- Public Transportation Companies
- Taxicab Companies
- Handicab Companies

If your first category lists more than 120 (or so) agencies it is probably too large and needs to be reduced by shifting some names to the second category. If your first category is well below 120, increase it with names from the second category.

You will now be ready to proceed to the business of actually obtaining the needed information for every community resource.

The next chapter describes how to arrange and conduct personal interviews with the agencies on the first of your three lists. The following chapter is a guide to obtaining information by mail.

Chapter 3: Obtaining Information by Personal Interview

What is an Interview?

By and large, interviewing is really only a form of guided conversation between two people. The conversation is guided in that one person usually asks a set of planned questions, while the other supplies the answers. But all successful interviews are really two-way conversations: both participants talk, both listen, one to the other. Somehow, during the course of this social (usually quite congenial) conversation, the necessary information is shared among the participants.

Interviewing is, therefore, no more difficult than holding a polite conversation with a casual acquaintance. The success of your interviews will depend, of course, on what you say, and how you say it. But it will depend just as much on what the other person says, and on how you listen. It will depend on what you display at the interview in the way of your sincerity, interest in your center, and interest in the director's own agency. This will be conveyed by the way you participate: the way you ask questions, the way you listen, the way you answer questions.

Arranging an Interview

Phone Call

Your best personal contact at each agency will probably be the agency director. First, telephone the director's office and inform his secretary that you are calling on behalf of the Administration on Aging, which will soon be opening an information and referral center for the elderly in your community and which is presently developing a Resource File to be used by the I & R Center. At this point, she will probably connect you with the director, if he is available. If he is not available, she will ask you for your name and telephone number so that he can return your call. (If she does not offer to do this, be sure to suggest it yourself unless you do not mind making repeated phone calls. You will still have to make repeat calls, but anything you can do to minimize wasted effort will be worth your while.)

When you do talk to the agency director, introduce yourself by simply giving your name and title. Then briefly explain the purpose of your call. If the director asks you what an information and referral center is (you'd be surprised how few people know), be prepared to give a knowledgeable reply by stating that it is a place where people can call for information about services that affect them most directly. Then explain what you mean, saying that people, especially older people, often do not know where to go to obtain the services they need, and that they very often do not even know about all the services available to them. Then add that the purpose of an information and referral center for older people is to link services and people together. This should suffice. Be sure to return to the reason for your call, which was to make an appointment for an interview. Once a definite time and date has been set for the interview, it would be wise to suggest that you will send the director some materials to review before your appointment. This will make the interview easier.

In many cases, a busy agency director may ask that you meet with a key member of his staff. Such a meeting will usually do quite well.

Be sure also to leave your telephone number with the director's office, so that you can be quickly contacted if your appointment must be changed.

Be certain to keep a calendar of appointments and a record of all agencies which have been contacted, and by whom. Nothing is so embarrassing as a forgotten appointment of a duplicate appointment.

After your phone call it is important also that you confirm your appointment with the director, in writing. Writing the director a letter assures that both of you agree on the meeting date and that neither of you have made erroneous appointments. The letter will also give you an opportunity to send the director some written materials about the I & R center and about your future meeting with him. (These are discussed in the next section.)

Appendix A, at the back of this manual, contains a model letter for confirming your appointment with the agency director.

A Pre-Telephone Call Letter of Introduction

Some people prefer sending a letter of introduction even before calling to arrange an appointment. The letter approach is useful also in those instances where it has not been possible to reach the director by phone for one reason or another. In this case the letter serves as your first introduction, so that when you do make your phone call the director probably will already know who you are and why you are calling.

When calling, even after the letter, it may still be necessary to refresh his memory, stating briefly who you are and explaining that you are calling to make an appointment with him in regard to the survey of community resources for the elderly that is being conducted in the community by the Administration on Aging in preparation for the opening of an information and referral center for the elderly. Give him an opportunity to ask questions about the survey. Make sure that you know its purposes and rationale and that you have reviewed the questionnaire thoroughly, so that you can address yourself to any questions he might have about it. Then set a time and date for the appointment.

Appendix A also includes a model letter of introduction which you might mail before telephoning agency directors.

Number of Daily Schedule Appointments

Interviews will ordinarily take less than one hour. But, if you include also the time required to record all the information you have obtained, travelling time to and from the interview, plus time lost to unforseen delays, each interview will take up much more of your time. You will discover soon enough that it will generally be unwise to schedule more than four interviews for any one day, two in the morning and two in the afternoon. For the same reasons you should allow two hours between every pair of interviews.

Even if you are prepared to conduct four interviews each day, you will very often find yourself with free time because you have not been able to schedule an interview for some particular time slot. On the average you should expect to be doing two or three interviews a day, some ten to fifteen per week per interviewer.

Arranging an Appointment with an Agency Director

1. Send letter of introduction (optional)
2. Telephone the director to arrange an appointment
3. Send letter which confirms your appointment and includes introductory materials.
4. Visit the director for the interview
5. Send thank you letter

Remember

...keep a calendar of appointments and a record of contacts

...leave your telephone number with the agency director

...confirm each appointment in writing

The number of weeks you will have to spend interviewing agency directors depends, of course, on the number of interviews you can "pack" into every week of your schedule. Several things can be done to keep your interview schedule tightly packed.

1. Interviews deserve priority over office work. Arrange your office work around your interview schedule, not the reverse. Do your office work in the time slots left open because you have not been able to arrange interviews for those times.

2. Be forceful when arranging interviews. Agency directors are quite busy; yet they can squeeze another hour into their schedules, if you prevail upon them. It is , of course, important that you be polite when talking to them to arrange an interview. Do not be afraid to say honestly that your schedule is also a busy one and that it would be very helpful if they could perhaps meet with you on, say, Wednesday afternoon or Friday, 9:00 A.M.

The next three are very important.

3. Arrange your interviews well in advance. One of the worst tactics you can take is to try to arrange interviews one to four days in advance. Most agency directors will be unavailable on such short notice, and you will find yourself wasting at least half of your time. Arranging for interviews in advance means well in advance, ten to twenty days in advance in most cases. This will require planning. Every week you will have to list the agencies you wish to visit two to four weeks later, and arrange to have letters mailed to those agencies. You will also have to telephone them well in advance of each visit.

4. Arrange interviews with many agencies, more or less at once. Mail one or two dozen letters at once, and follow-up in a few days with one or two dozen phone calls. With this approach you will always have some more phone calls to make and some more possibilities of filling in your own time schedule.

   When you have arranged interviews with half of your initial batch of letters start on a second round of phone calls. Never hold off a second batch of phone calls until after the first batch of interviews has all been arranged. You may be forever at the telephone if you do not plan ahead and crowd your schedule.

   Warning: It is just as unwise to try to mail fifty or more letters at once, and then try to make fifty phone calls. By the time you contact your fiftieth director by phone, weeks will have passed by, and he will have forgotten all about you (or have a rather poor imporession of you!)

   Batches of one or two dozen letters and phone calls are about right for arranging interviews in an efficient manner.

5. Use your staff. You are not the only person who is able to interview an agency director! Your own time may sometimes be too valuable, and you cannot afford to keep putting interviews off. Besides, your staff will learn a lot of valuable information by conducting their own interviews, and they will be making useful personal contacts. Use everyone in your office whom you feel can handle an interview. Don't do the whole job yourself.

The business of interviewing agency directors will take weeks of your time. As time passes the interview program is likely to become boring and you, tired of it. You may want to get it over with by writing for your information, and by conducting short and superficial interviews. You may be anxious to demonstrate your competence by opening your center to the public, and others may pressure you to do the same. We have already discussed these pressures and the need to continue your interview program until it is more or less completed. The several suggestions made on the preceding pages are also important, for if you follow their advice you will be able to complete a maximum number of interviews in a short period of time.

The Interview

Keeping the Appointment and Being on Time

Once you have made an appointment, keep it, unless something unforeseen forces you to change it. If this does happen, be sure to call and inform the director that you will not be able to keep your appointment and would like to schedule another one. Similarly, if you find that you will be late, be sure to call ahead. Otherwise you may have to schedule a new appointment. Keeping your appointment and being on time convey courtesy and consideration for others, and also indicate that you take your job as seriously as the agency director takes his.

How to Dress

Use your good judgment. There is no point in dressing very formally, yet there is also no point in dressing very casually. Remember that you are representing your community I & R center, and that appearances do count.

When you Arrive for the Interview

When you arrive you will probably have to wait a few minutes in the reception area. You should not have to wait too long, but in the event of some slip-up on the director's part, it would be wise to inquire about how long the wait might be. (Remember that agency directors are busy people with many responsibilities and distractions which sometimes may prevent them from closely adhering to time schedules.) If the director's schedule is too packed, you may find yourself sitting for a long period of time. If you have a later appointment at another agency, be sure that you are not risking the next appointment by delaying the present one. It may be wise to reschedule the first one and leave for the next one, rather than to have to wait at the first one and upset the next one as well. These things will happen from time to time, and it is well to anticipate them and plan around them.

On the other hand, if it is your last appointment for the morning or for the afternoon, waiting for fifteen minutes or even a half hour may be irritating, but it is much easier than rescheduling the appointment.

Starting the Interview

Even if you have done all the right things, you will still meet the occasional director who does not seem to be particularly happy to make your acquaintance. He may question the need for an I & R center for the elderly; he may not like the materials you have already sent him; he may resent or be suspicious of being interviewed by a representative of another agency; he may wonder about your qualifications for the job you are doing. Many experienced people, for example, wonder about the ability of new recruits to undertake tasks which seem to them to require much experience. It must be remembered also that agency directors are busy people with heavy demands on their time. Taking time out for an interview of this kind may seem an additional burden to them. Therefore, it is very important for you to come to the interview having the purposes of the survey clearly in mind. You must convey with authority the sense of knowing what you are about and why you are there.

There is no one way to begin an interview. Most begin with the exchange of a few pleasantries and then pretty much proceed to the matter at hand. Since you will be on the director's home territory, he may begin by asking you something about the information and referral center project and about the resource survey. After this, you might ask him if he has had an opportunity to review the materials you have already sent him, and if he has any questions about them. This will give him an opportunity to indicate how much homework he has done before the interview. In some cases, he may have examined the materials thoroughly and planned his replies to your questions. In other cases he will have preferred to wait until the interview to do so.

In only a few minutes you will be able to turn to the main purpose of your visit: finding out about the agency or organization.

During your first interviews you will want to stick very closely to the Agency Questionnaire (Apendix B), asking the questions in the order in which they are presented. If an agency does not offer services in a particular area, skip on to the next section. Your competence at interviewing will soon develop very quickly as a result of these first few sessions and you will find yourself phrasing your inquires in your own words, that is fine! Following the questionnair as a guide will insure that you cover all the points requested. Finally, by <u>writing all the information down as soon as you receive it</u>,the questionnaire insures against forgetting, misplacing, or confusing any information. (After five days of three interviews per day you are very likely to be forgetting things or confusing one agency with another!)

Therefore, use the Agency Questionnaire as a record form on which you enter each piece of information as soon as you receive it. And, toward the end of the interview, check all the pages of the Questionnaire and make sure that all the relevant blanks have been filled in. In this manner you will be certain that you have touched on all the items that you need to know, and that every necessary piece of information is permanently recorded for later use.

The special needs of your own community may require that you add one or more items to the Agency Questionnaire. Do not eliminate any item on the Questionnaire. Every one of the items included has generally been found by other I & R centers.

Items Included in the Questionnaire

General classes of items included in the Questionnaire are listed below. Comments are ommitted wherever the items are self-explanatory.

1. Agency name, addresses, phone numbers
2. Director's name. (Contact Director only for special problems and for policy decisions.)
3. Names of agency staff for regular contacts and referrals.
4. Hours open; hours telephone is answered (the two are different).
5. Is emergency service available? (Includes emergency telephone numbers and contact procedures.)
6. Does the agency serve the elderly?
7. Types of services available. (Obtain both general categories and details, where appropriate.)
8. Eligibility requirements. (Financisl, residential, membership,etc.)
9. Is there a waiting period?
10. How is the agency funded? (Government, Private.)
11. Are there any fees for services rendered? (Special rates for the elderly or for those unable to pay full rates?)
12. What referral procedures are to be used?
13. Are the offices near public transportation? (If yes, which trains or buses can be used?)
14. Stairs or elevators?
15. Date of interview, name of interviewer, and person interviewed.

Once the Questionnaire has been completed, promptly transfer the information it contains to the Agency Record Form. This is a job that your secretary should be able to do. The Record Form becomes the basis for building your Resource File. A copy of the Questionnaire should be sent to the State Office, where they will be kept for purposes of research.

Review of this Section

The Agency Questionnaire will help you during your first few interviews. It is also intended as a checklist to assure that all questions are asked, and as a record-sheet, to assure that information is not misplaced.

The Agency Questionnaire should be followed carefully. It is a tool to help you obtain and retain the information you need, quickly and without ommissions. Promptly transfer the information from the Questionnaire to the record-form.

Ending the Interview

When the Agency Questionnaire has been completed, you have fulfilled the purpose of the interview. The interview has come to an end. This does not mean that you should get up and leave abruptly. Express your appreciation to the director for his time and cooperation and tell him that he will receive a report of the survey findings when it is completed.

Thank you Letters

A letter of thanks should be sent to every agency director who participated in an interview or who returned a Mail Questionnaire. Appendix A contains model letters for this purpose.

In the case of the most important two or three dozen agencies, you may also wish to telephone the director to thank him for his assistance. This option should also be considered for any other persons who have gone out of their way to be especially helpful. When operating the center you will find the personal contacts that you have cultivated extremely valuable. It is worthwhile that you demonstrate and maintain your friendship.

Chapter 4: Obtaining Information by Mail

It was pointed out earlier that many of the agencies and organizations serving the elderly probably cannot be visited in person, due to limited personnel and time budgets. It is important, however, to include these in the Resource File. We suggest that organizations that cannot be visited in person be contacted by mail.

The Mailed Questionnaire

Each organization contacted by mail will be sent a Questionnaire which is to be filled out and returned. A covering letter which should accompany the Questionnaire is included in the Appendix. It explains the I & R Center and Questionnaire to everyone receiving these materials by mail.

Once you have identified the large number of organizations that cannot possibly be contacted in person, the cost of mailing questionnaires to each is rather small.

The reply rate to your mailed requests for information will vary from 40 to 80 percent. By keeping a list of the names and addresses of all organizations and a check-off list of those replying you will be able to identify the ones which have not as yet replied. After waiting two to three weeks it will be wise to mail second requests for information. In your second mailings include new questionnaires and a note pointing out that an earlier request had not been returned. If the second requests are also not returned you may wish to telephone the directors of several of the more important organizations to personally request that the Questionnaires be returned.

Chapter 5: Contacting Private Practitioners

In every community there are a large number of physicians, dentists, lawyers, ministers, psychologists, pharmacists, etc., serving the elderly. Their names are given in the Yellow Pages. But this large a number of individuals simply cannot be contacted for information, even by mail. (Nor would such information be particularly valuable.) We suggest the following activities which will integrate the community of professionals into your program.

1. Yellow Pages. In some cases the Yellow Pages indicate specialization. For instance many editions of the Yellow Pages do include the phrase, "Practice limited to ... (gerontology, pediatrics, obstetrics, etc.)" If you have the time it might well be wise to arrange personal visits with your community gerontologists.

2. Professional Societies. In place of visits to each practitioner, a limited number of visits with the heads of local chapters of professional societies might be in order. Is there a county or city medical society, a bar association? The society representative may be able to fill you in on local patterns of practice and special services. And if it publishes a newsletter it can inform its members of your center and program. The society officer may even be able to supply you with lists of those professionals in the area who specialize in serving the elderly.

Chapter 6: Processing the Information to Create a Resource File

This chapter suggests a method for creating a Service File and an Agency File from the interviews and questionnaires. The Agency File will be created first. The Service File will be derived from the Agency File.

Creating the Agency File: The Agency Record

The Agency File will consist of the Agency Records that have already been completed, plus Agency Records that are to be filled out from mailed Questionnaires. A copy of the Agency Record is shown on the following pages.

> Important The Agency Record for agencies that have been visited must be prepared by the interviewer and as soon as possible after the interview is over. Experience has shown time and time again that seldom will an interviewer write down in his initial report all the information that he has heard and learned. Days later that information is forgotten and lost. But if the interviewer can arrange to transfer his own information onto a permanent record, and soon after the interview experience, he then has an opportunity to rethink his experience and fill in the missing items.

When the Agency Records have been prepared, duplicate the Agency Record to create as many copies of it as there are Resource Files. File one copy of the Agency Record in each Resource File, alphabetically, by Agency name.

Each person working in the I & R Center should have a copy of the Resource File at his desk. The easiest way to do this is to copy each Agency Record and place it in a loose-leaf notebook or rollex. Corrections can be made easily, and it is easy to carry around. There should, however, be one master Agency File for the I & R center from which all Resource Files are made. The master file cards should be 9x12 in size so that all the necessary information may be included.

AGENCY RECORD

Agency name ______________________________

____

Principal funding: __Fed __State __Local __Sponsor/parent (______) __Other (______) __Endowment __Contributions __UF/CC/RF

Type: __Fed __State __Local __Pri/nonprft __For profit

Preferred Frequency of Updating (months) 3[] 6[] 12[]

Date of Last Updating of Record ______________

	MAIN		BRANCH	
Address	______	Zip ______	______	Zip ______
Director	______	Tel ______	______	Tel ______
Contact Persons	______	Tel ______	______	Tel ______
	______	Tel ______	______	Tel ______
Days open	visit ______	Tel ______	visit ______	Tel ______
Hours	visit ______	Tel ______	visit ______	Tel ______
Emergency services?	______		______	
Public transport/parking?	______		______	
Stairs/elevators?	______		______	

Eligibility (age/residence & time/financial/legal/other :: how to document?) ______________________________

____

Fees? (any reduction for older people? how to document) ______________________________

Preferred referral procedure (walk-in/phone/formal referral and from whom) ______________________________

Waiting list? (which services, how long) ______________________________

Intake or Application Procedures ______________________________

____

Preparing the Service File

The person who creates the final Agency Record has one other task. He must decide also the categories in the Service File under which a particular agency is to be entered. Which services does the agency offer?

There is a simple way of going about this task. After preparing a new Agency Record, the person who has filled out the Questionnaire (usually the interviewer) should use the categories suggested to identify all the services offered by the new agency. These services will be listed on the back of the Agency Record.

The entire process of creating the Resource File is illustrated on the following page.

It is important to note that an agency may be listed under more than one service category, since many agencies give a variety of different services. The critical point is not to try to squeeze an agency into the best category, but rather to include all agencies in a category that may be appropriate. You should keep in mind what you want to get out of the Resource File. You can evaluate the appropriateness of the agency for each person you help, at the time you are helping him. But if you aren't aware that an agency might be helpful for a particular problem, you obviously won't even be able to consider it.

As with the Agency master File, there should also be one master Service File from which all other Service Files for the Center are made. The master Service File cards should be 9x12 in size.

SERVICES

FINANCIAL____________________

HEALTH____________________

HOUSE-HELPS____________________

HOUSING____________________

LEGAL____________________

LEISURE TIME____________________

PERSONAL-SOCIAL____________________

TRANSPORTATION____________________

MISCELLANEOUS____________________
(taxes,emergencies,
information & referral

Info obtained from:
____
(title)

Recorded by__________
Date __________

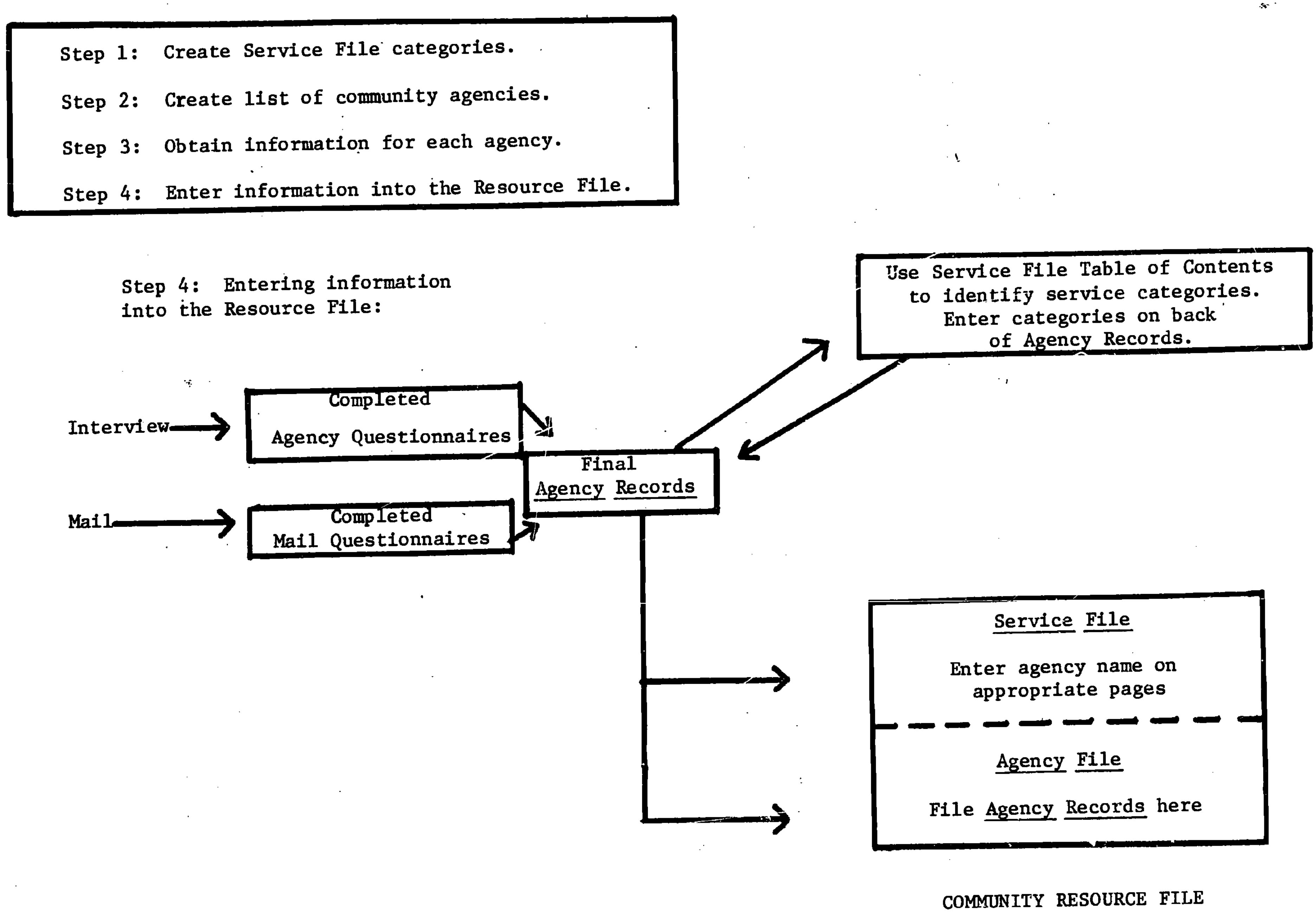

Figure 1

Creating the Community Resource File

Chapter 7: Recruiting Help to Prepare the Resource File

If you plan to serve a medium or larger community you may find it useful and even necessary to seek help in carrying out the initial agency interview program. Consider contacting volunteer service organizations, for instance, the Retired Teachers' Association, the Junior League, the League of Women Voters, etc. Colleges or universities in your community will often have service clubs or fraternities willing to lend a hand, especially if the work is interesting.

As is always the case with volunteers, you must balance the assistance they will provide against the effort and time of training. If your volunteers will be interviewing agency directors and representing the I & R Center to other agencies you will have to spend a good deal of time planning, training, and coordinating. In deciding to use volunteers, two factors should be considered.

1. The Competence Level of Your Volunteers. How much time will you be spending in training and coordination before you are assured of the competence of your volunteers?

2. Number of Hours Offered by Each Volunteer. Volunteers who are available only a few hours each week may be valuable in manning the center, but they will be of little value during the intensive period of Resource File development. For the latter purpose your best volunteers will be those who can work intensively for several weeks.

   Here too training is important. How many hours of work can you expect to receive in return for six to eight hours of training and coordination?

The above comments are not intended to discourage the recruitment of volunteers. They are intended only to point out the several factors to be considered in making your cautious decision. The right volunteers, after all, can cut weeks off your schedule for preparing the Resource File, and they can free you to attend to other pressing matters.

There is one additional key advantage to recruiting volunteers. Volunteers who are involved in preparing the Resource File and setting up the center are likely to consider staying on by volunteering to help operate the center. If you are planning to recruit volunteers to run the center, consider recruiting them three or four months earlier to develop the Resource File.

Training Volunteers to Interview Agency Directors

Your volunteers are not likely to have done much interviewing, especially of organization administrators. And, they probably don't know very much about the I & R Center. It is essential that they under-go some sort of training program before undertaking any interviewing on their own. In their eagerness to help, some volunteers will insist that they have done similar work before, or that it is all very clear and very simple. This may or may not be true. In any case, you should prepare a training program to develop their skills.

In preparing your training program, help from your consultant or the Network Office may be useful. In any case, the following points should be considered for such a program.

1. Plan a training session of at least four or six hours. Spend some time describing the I & R concept and your plans for the center. Describe how the necessary information will be collected.
   Then spend at least two, perhaps four, hours practicing interviews. First, discuss the purpose of every question on the Agency Questionnaire, and consider all the possible replies and how to handle each. Then "role-play," that is, use pairs of people to act out interview situations.
   After each role-play, discuss it and suggest improvements to better the interview. Role-playing is an excellent tool for this purpose.
   It is best to assemble all your volunteers for one training session. The cost in your own time is drastically reduced. The volunteers can get to know each other, and they will usually provide helpful information, advice, and criticsm to each other. Finally,

during role-playing, the audience learns almost as much as do the two role-players.

2. After formal training, ask each volunteer to accompany you to one interview with an agency director. The volunteer should not participate, only observe.

3. Finally, accompany each volunteer to his first interview. Observe his style and delivery, but <u>do not interrupt</u>. (Take notes if you wish.) After the interview, discuss the experience. If you are convinced that this volunteer can do an adequate job, let him go to work. If you feel that some additional guidance is required, repeat steps 2 and 3.

Remember to use your own good judgment in working with people whom you recruit for interviewers. Be sensitive to their need for a word of praise for a job well done or for the time that they have given you. A personal note of thanks is always appreciated. Your sincere recognition of their efforts will have additional pay-offs in the later operation of the center, especially if one or more volunteers decide to stay on. The likelihood that some will volunteer to stay depends, of course, on their enthusiasm for the center's program. But it depends just as much on their feelings towards you. Have you made yourself the kind of person they would like to continue working for? Have you made the I & R center into the kind of organization volunteers would enjoy participating in?

Chapter 8: Keeping the Resource File Current

Even the best Resource File loses its value very quickly if it is not kept up-to-date. There is no sense in expending a lot of effort and money creating a superb Resource File, if one does not assure that the file will remain up-to-date.

You can expect to be making two types of changes in the File from time to time.

1. Correcting minor errors and omissions in present files.
2. Updating your file with major new reports from existing and new agencies.

Correcting Errors and Omissions

This category includes any and all changes that are identified during routine work. Perhaps an address has changed, or an agency policy has been alterd; perhaps an agency claims to offer some service, yet it in fact offers no such service to the elderly.

The problem here is not in identifying the change. Rather, it is in assuring that the change is systematically entered into all copies of the Resource File. If there is no systematic procedure, then each staff person will be aware of only those bits and pieces of valuable information that he himself discovers. Errors will continue to be made by every other staff person. And, if a correction is identified then later forgotten, it is lost to everyone. We therefore emphasize again that changes in the Resource File must be entered into all copies of the File.

There is for this purpose a simple procedure. The person identifying the change must enter the change on a new Agency Record Form, on which he records also the name of the agency, his own name, and the date. The rest of the Record may remain blank. The form is then sent, with a routing slip (a slip with every staff member's name on it) to all other staff members. Each person corrects his own copy of the Resource File, crosses his name off the routing slip, and passes the form on. (The form may be discarded when everyone has seen it.)

Making Major Corrections and Additions

Agencies change. They sometimes do not publicize their changes. In order to keep the Resource File up-to-date it will be necessary, therefore, to check with each agency and organization from time to time. This is best done by mailing the agency director a fresh copy of the Agency Record, and requesting the record be corrected, if necessary, and returned. (Be sure not to send a copy of the Agency Record that has pencilled comments. These can sometimes prove embarrassing.) If only minor changes are reported by the agency, they can be communicated to all staff members by means of the routing slip. If they are major, a new set of Agency Records will have to be prepared and distributed.

A model cover letter to accompany a request for updating your file is given in Appendix A.

From time to time new agencies will come into existence in your community. These should also be included in the Resource File, using the same procedures that were used to create the Resource File in the first place.

Appendix A: Model Letters

1. ... letter prior to telephone contact
2. ... letter to confirm interview appointment (includes Agency Questionnaire)
3. ... letter to accompany Mailed Agency Questionnaire
4. ... thank you letter to follow personal interview
5. ... thank you letter to respondents of Mailed Questionnaire
6. ... follow-up letter to non-respondents of Mailed Questionnaire
7. ... letter for updating Resource File
8. ... response form for updating agency information

1. ... letter prior to telephone contact

(Note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear Director:

I am writing to request your participation in a community resource survey that is being conducted in our community by the Administration on Aging and shall be calling you in a few days to arrange for an appointment with you. The survey is being conducted to prepare for the opening of an information and referral center for the elderly in our community. Information secured in the survey will be used to develop a resource file that can be used in the operation of the center. The center is a demonstration project designed to develop better linkage between older people to the services they need and is being funded through the Administration on Aging for this purpose.

I would very much like to make an appointment for an interview with you about the services offered by your agency for older people and shall call you sometime in the next few days to schedule an appointment with you at your convenience.

Sincerely,

2. ... letter to confirm interview appointment (includes Agency Questionnaire)

(Note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear Director:

I am enclosing the questionnaire that I described to you during our recent telephone conversation. It is designed for the survey on community resources and services for the elderly that is being conducted by the Administration on Aging in preparation for the opening of an information and referral center for the elderly in our community. Information secured in the survey will be used to develop a resource file that can be used in the operation of the center. As I explained to you, the center is a demonstration project designed to develop better linkage between older people and the services they need and is being funded through the Administration on Aging for this purpose.

You may complete the enclosed questionnaire fully or in part before our appointment on ___(date)___ at ___(time)___, or you may wait until our appointment when I will be happy to go over the questionnaire with you, and to answer any questions you may have regarding the survey or the information and referral center project. In the meantime, if you wish to contact me, I can be reached at ___(phone number)___. I am looking forward to our appointment.

Many thanks for your interest, time, and cooperation.

Sincerely,

3. ... letter to accompany Mailed Agency Questionnaire

(Note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear Sir:

I am enclosing a questionnaire that has been designed to obtain information about resources and services available in our community for older adults. The survey is being conducted to prepare for the opening of an information and referral center for the elderly in our community. Information secured in the survey will be used to develop a resource file that can be used in the operation of the center. The center is a demonstration project designed to develop better linkage between older people to the services they need and is being funded through the Administration on Aging for this purpose.

We would very much appreciate your cooperation in this survey by completing the enclosed questionnaire by ____(date)________ and then returning it to our office in the stamped, addressed envelope. If you have any questions regarding the survey or the questionnaire please call me at _(phone number)_ and I will be happy to help you in any way I can.

Thank you very much for your time, interest and cooperation.

Sincerely,

4. ... thank you letter to follow personal interview

(Note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear _________:

Thank you very much for your helpful cooperation in participating in the community resources survey that is being conducted by the Administration on Aging in preparation for the opening of an information and referral center for the elderly in our community. I enjoyed our interview and am looking forward to working with your agency in our mutual attempt to better meet the needs of our older people in our community.

Again thank you so much for your interest, time, and cooperation in this important endeavor.

Sincerely,

5. ... thank you letter to respondents of Mailed Questionnaire

(Note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear ________:

Thank you very much for your cooperation in the Community Resource Survey that is being conducted by the Administration on Aging in preparation for the opening of an Information and Referral Center for the elderly in our community.

Your time, interest, and cooperation in this important endeavor are very much appreciated.

Sincerely,

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6. ... follow-up letter to non-respondents of Mailed Questionnaire

(Note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear _______________:

I am again writing to request your cooperation in completing the questionnaire that was mailed to you as part of a survey of community resources that is being conducted by the Administration on Aging in preparation of the opening of an information and referral center for the elderly in our community. As you undoubtedly know, the information obtained in the survey will be very important in providing information and referral services to older people who need to know what is available in the community to meet their needs.

We would very much appreciate your completed questionnaire by ____________________. If you have misplaced or lost it, or if you have any questions regarding the survey of the information and referral project, please call me at (telephone number) and I shall be happy to assist you in any way that I can.

Thank you very much for your cooperation.

Sincerely,

7. ... letter for updating Resource File

(note: This letter should be typed, not duplicated)
(Use letterhead stationery)

Dear ____________________:

I am enclosing a copy of your agency's card that is being used in the resource file of the information and referral center for the elderly in our community.

As you know, it is important that information used by the center be kept current and accurate if the center is to be truly effective in linking older people to the services they need. Would you please look over the enclosed copy of your agency's card to see if corrections or additions need to be made on it and return it to the information and referral center in the enclosed stamped, addressed envelope? Use the enclosed response form to note if any changes or additions are to be made, and if so, please list them in the space provided.

Thank you very much for your time, interest and cooperation.

Sincerely,

Director,
Information & Referral Center
for the Elderly

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8. ... response form for updating agency information

Agency or organization name ______________________________

Agency address ______________________________

Please check below if changes are to be made on your agency card for use in the resource file for the information and referral center for the elderly.

There are no changes to be made. _____

There are changes to be made. _____

If there are changes or additions to be made on your agency card, please list and note below, or note directly on the appropriate parts of the copy of your agency card.

____

____

____
Director of agency

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Appendix B

Service File Page

Agency Questionnaire

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Service ______________________________

Organization Name	Telephone	Comments

(typical page from Service File)

AGENCY QUESTIONNAIRE

Please Note: A community resource survey is being conducted in our community by the Administration on Aging in order to prepare for the opening of an information and referral center for the elderly. The information secured in the survey will be used to develop a Resource File that can be used in the operation of the center. The center is a demonstration project designed to develop better linkage between older people and the services they need. Please complete the questionnaire as indicated. If you have any questions, please call (phone number).

1. Agency, organization or practitioner's name ______________________________

2. Address ______________________________

3. Phone number __________ 4. Director's or practitioner's name ______________

5. Hours open __________ 6. Hours phone answered ______________

7. Emergency phone numbers ______________________________

8. Do you offer services or programs for older adults Yes ____ No ____

9. If no to 8, please disregard the rest of this questionnaire. If yes, in which of the following areas do you offer services for older people? Please check as many as are relevant.

   a. Financial ____

   b. Housing ____

   c. Health ____

   d. Home-helps ____

   e. Legal ____

   f. Leisure time adtivities ____

   g. Personal-social ____

   h. Spiritual ____

   i. Transportation ____

   j. Miscellaneous ____

      1) Taxes ____

      2) Emergencies ____

      3) Generalized information and referral service ____

10. Within the area or areas in which you provide service to older people, please check which of the following listed services or programs you offer. Please add any that are not listed.

   I. Financial ____

      A. Financial assistance - income ____

         1. Emergency ____

         2. Monthly cash grants ____

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