



Navigating Challenging Client Contacts

RESOURCE LIST

Compiled by the national work group for
challenging client contacts with members
from the aging and disability network.

June 2024



Overview

About:

Led by the State Health Insurance Assistance Program Technical Assistance Center (SHIP TA Center), the National Work Group to Address Challenging Client Contacts was formed to identify and discuss resources such as policies, procedures, and training that address challenging client contacts. Challenging client contacts include but are not limited to racist, anti-government, and potentially violent or suicidal contacts that have increased in recent years. Challenging client contacts can impact the professional well-being of staff and volunteers in the aging and disability networks.

The work group includes representatives from ADvancing States, Alzheimer's Association, Inform USA, National Council on Aging (NCOA), SHIP TA Center, Senior Medicare Patrol (SMP) Resource Center, USAging, 988 Suicide & Crisis Lifeline, and Vibrant Emotional Health. The resource list is also available as a Microsoft Excel file. ADvancing States created the resource list under a sub-contract with the SHIP TA Center.

Your organization may have policies and procedures regarding how staff and volunteers respond to challenging client contacts. Consult with your supervisor or program leader before recommending or instituting new procedures.

Vision Statement:

The goal is to empower aging and disability programs with resources that address working with challenging clients and support the professional well-being of staff and volunteers.

How to Use the Resource List:

Program managers can use the resource list to identify specific material by category that will best assist and support their front-line staff. The resources are categorized by type of challenging contact, and resources may span more than one category. Click on the category below to access resources for that category.

- [Techniques for Front-Line Staff](#) – Resources on foundational communication skills
- [Frequent \(Familiar\) Callers](#) – Resources addressing contacts who experience social isolation and other issues
- [Racial/Cultural/Bias](#) – Resources addressing contacts who make racist, culturally, and sexually inappropriate comments and other types of bias

- [Mental Health](#) – Resources addressing contacts who may demonstrate behavioral health issues
- [Threatening/Offensive/Aggressive](#) – Resources addressing contacts who express threatening, offensive, and/or aggressive behavior
- [Suicide](#) – Resources and interventions for individuals who express suicide ideation
- [Professional Well-Being/Self-Care](#) – Resources addressing well-being and self-care for professionals and volunteers
- [Organizational Practices](#) – Resources addressing onboarding, training, supervision, and ongoing staff/volunteer support and development
- [Contributors](#) – Describes partner organizations and includes links to the organizations' websites and contact information
- [Work group members](#) – lists the individual members, past and present, who participated in the National Work Group for Challenging Client Contacts

Links to the resources are embedded in the resource title. To access a resource, hover your mouse over the title and click (or follow the on-screen directions to open the link).

Techniques for Front-Line Staff

Title: [Guidance for Supporting Familiar Individuals](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

Format: Tip Sheet

Description: Familiar individuals can evoke many reactions from crisis center staff who are supporting them. Some may become exhausted or frustrated by repeated contacts or feel helpless because it appears to them that they aren't making a measurable difference in helping the individual. Some may value the very real relationship which includes being part of someone's daily support network or feel comforted by seeing a familiar name, phone number, or hearing the voice of someone they enjoy talking with. Striking the balance between empathy, maintaining healthy boundaries, and setting appropriate limits is an ongoing challenge for crisis counselors and crisis center supervisors. The goal is to always listen and acknowledge the individual's concerns, conduct an assessment, and determine an appropriate intervention, including when to end the conversation.

Related Category: [Frequent \(Familiar\) Callers](#), [Mental Health](#), [Suicide](#)

Title: [Responding to Abusive Behavior During 988 Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

Format: Tip Sheet

Description: Abusive, harassing, or sexually motivated contacts to the Lifeline can be very challenging to manage, both clinically and operationally. Some contacts can become quite disruptive to the operation and exhausting to the staff. A provocative individual can evoke certain reactions from counselors even when experienced and well-trained. Some crisis counselors may endure an abusive or harassing conversation and continue attempting to try to make progress with such an individual for an extended period of time. Some will have a lower tolerance for what may be perceived as a prank or abuse of the service and quickly end the contact, even if it may be premature to do so. Striking the balance between empathy and limit-setting is an ongoing challenge for counselors and supervisors.

Related Category: [Mental Health](#), [Threatening/Offensive/Aggressive](#), [Suicide](#)

Title: [Responding to Angry Expressions During Crisis Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2023

Format: Tip Sheet

Description: Anger is often used as a mechanism to cope with complex emotions. Anger and frustration are common responses to heightened emotional states, such as stress, fear, and sadness. Individuals who are expressing anger may also be struggling with feeling misunderstood, as though their needs are not being met, or as though they have lost control of their life. Regardless of the reasons behind the anger, it is important that crisis counselors respond to individuals in ways that validate their emotional experience and empower them to move through the crisis.

Related Category: [Mental Health](#), [Threatening/Offensive/Aggressive](#)

Title: [Closing Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2023

Format: Tip Sheet

Description: Wrapping things up with callers, chat visitors, and texters can sometimes be difficult. For every person who gets what they need from the crisis conversation and concludes the conversation on their own, there is another who would like to keep talking indefinitely and needs some guidance from the crisis counselor to bring the conversation to a close.

Title: [Frequent Callers: The Whole Story](#)

Author/Source: John Plonski/Inform USA (formerly AIRS)

Date: 2023

Format: PowerPoint pdf

Description: This workshop was designed to provide caregiving professionals with the knowledge and skills needed to effectively manage frequent callers. The presentation provides attendees with a comprehensive understanding of the topic, as well as practical tools and techniques for managing frequent callers in an I&R setting.

Related Category: [Frequent \(Familiar\) Callers](#), [Mental Health](#)

Title: [Dr. Brene Brown on Empathy vs. Sympathy](#)

Author/Source: RSA Short

Date: 2023

Format: Video

Describes the difference between empathy and sympathy and how individuals can create empathetic connections.

Title: [Validation: Defusing Intense Emotions](#)

Author/Source: Harvard Health Publishing, Harvard Medical School

Date: 2023

Format: Article

Description: Describes how learning to listen to and validating others can help you navigate difficult conversations. Practical tips are provided. Scenarios include but are not limited to a work setting.

Title: [Adding Empathy and Compassion Into Your Toolkit](#)

Author/Source: Inform USA

Date: 2023

Format: Webinar

Description: Build your connection toolkit with empathy and compassion. Both are essential for quality information and referral contacts and are required by the Inform USA Standards. You'll learn what these concepts are and what they are not. Walk away with hands-on tools to help you increase your skills for your next contact.

Title: [An Introduction to Person-Centered Thinking Webinar](#)

Author/Source: SHIP TA Center

Date: 2023

Format: Webinar

Description: The webinar strengthens awareness of person-centered thinking among counselors and team members in SMP, SHIP, and MIPPA programs.

Title: [Furthering Person-Centered Thinking Through a Trauma-Informed Approach](#)

Author/Source: SHIP TA Center

Date: 2023

Format: Webinar

Description: The webinar will expand on concepts presented in the first webinar, An Introduction to Person-Centered Thinking, to strengthen awareness of person-centered thinking among counselors and team members in SMP, SHIP, and MIPPA programs.

Title: [How Can I De-Escalate a Situation When Someone is Angry or Agitated?](#)

Author/Source: NSW Government, NSW Health

Date: 2023

Format: Website

Description: This brief article outlines a seven-step process for working with an agitated or angry person. The acronym "LOWLINE" is used to outline each of the seven steps.

Related Category: [Mental Health](#)

Title: [Dread Them No More - Working with Challenging Calls](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Working with challenging calls can be one of the most difficult tasks required of Community Resource Specialists. The reasons a call may be challenging can vary; as such, different approaches and techniques will be more or less effective depending on the caller type. In this workshop, presenters discuss various categories of challenging calls, discuss approaches to tackling the challenges presented, and role-play several scenarios.

Related Category: [Threatening/Offensive/Aggressive](#)

Title: [Managing Difficult Calls: Looking in The Mirror](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: This workshop addresses the one component of difficult calls that specialists can control - themselves. Accepting that there is no way to ensure difficult calls will never happen, this introspective look into how we view our work will empower us to be able to assertively address our behaviors, reactions, and emotions in a way that will mitigate the impact of difficult calls have on our agencies and us.

Related Category: [Threatening/Offensive/Aggressive](#)

Title: [Using Your Janet Jackson Voice - Managing Difficult Callers](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: "Wouldn't Life Be Much Better If We All Spoke At A Whisper Like Janet Jackson? No, seriously." - King Sukii, Associate Editor at Globalgrind, Posted July 6, 2018. Tone of voice is very important. Community Resource Specialists may answer over 100 calls a day. Every person who calls has a unique situation, most of the calls are pleasant but we all have had the "difficult caller." In this session, you will learn that a lower tone of voice is one of the most effective ways to express empathy. Techniques for calming a client who is indignant or extremely emotional are discussed. You will find your tone of voice that is appropriate to address difficult callers.

Related Category: [Mental Health](#), [Threatening/Offensive/Aggressive](#)

Title: [Say What?! How To Communicate Anything to Anyone](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Communication is key. But what happens when the people communicating are speaking different languages? Learn what type of communicator you are and how to reach across that divide to influence others who communicate differently. Combining communication skills, NLP (Neuro Linguistic Programming), improvisation, and psychology will imbue the audience with new skills and understanding to ensure their message is heard, effective, and productive. Whether between coworkers, team members, bosses, or in front of an audience, this workshop will improve your game and allow you to accomplish more without misunderstanding and confusion. This presentation is for anyone who wants to learn more about communication style, conscious communication, thinking on their feet, direct and inferred communication, and how to get what you want with different personality types.

Related Category: [Threatening/Offensive/Aggressive](#)

Title: [Using Soft Skills to Enhance Medicare Counseling](#)

Author/Source: SHIP TA Center

Date: 2022

Format: Webinar

Description: In this webinar, we outline key soft skills necessary for your work, such as ways to develop trust and rapport with those you serve, leading to better outcomes for the beneficiary and better job satisfaction for you.

Title: [Solving the 7 Hardest Customer Service Scenarios \(Examples + Best Practices\)](#)

Author/Source: Sven, Userlike

Date: 2022

Format: Article

Description: Describes the “seven toughest customer service scenarios,” including when a customer displays racism, sexism, or is aggressive, and “best practices” on suggested responses.

Related Category: [Mental Health](#)

Title: [Talking About Medicare Coverage of the COVID-19 Vaccine](#)

Author/Source: SHIP TA Center

Date: 2022

Format: Manual

Description: Produced for the COVID-19 vaccine but contains evergreen tips for effective communication with clients: addressing bias, building rapport, and handling strong emotions or difficult behaviors.

Title: [Debrief for AEP Relief is a Gift for Counselors](#)

Author/Source: SHIP TA Center

Date: 2022

Format: Article

Description: As humans we are communal. On some level, we all crave being together. The debriefs provided the time to actively listen to each other and validate each other's feelings.

Title: [Providing Crisis Support Through Text and Chat](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: This presentation will help participants understand and recognize best practice considerations when serving individuals who reach out through text-based services and may be experiencing a crisis by helping responders better understand what makes text-based crisis counseling unique and what mindset to bring to the contacts you'll have on a shift. There is a great deal of overlap for voice-based and text-based crisis services. Both are available for people in crisis and aim to provide support, build connections, and increase safety. By providing services over text-based modalities in addition to a phone line, we can help more people, many of whom would never use a phone line.

Related Category: [Mental Health](#), [Suicide](#)

Title: [CPI's \(Crisis Prevention Institute\) Top Ten De-escalation Tips Revised](#)

Author/Source: Crisis Prevention Institute

Date: 2022

Format: Article

Description: This webpage from CPI provides 10 steps to de-escalation for a strong and more supportive work environment.

Related Category: [Threatening](#), [Offensive](#), [Aggressive](#)

Title: [The Effectiveness of Active Listening in a Crisis: Why it Works](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Have you ever wondered why we perform active listening as de-escalation in a crisis and why this is effective? This presentation will outline what happens in the brain when a person is in a crisis state and why active listening can restore neocortical functioning. The presenter will discuss the evolution of a crisis state and the changes in the brain during the build-up to a crisis when a person is in an active crisis state. The presenter will review how to practice active listening with a caller and how this technique de-escalates and restores the brain to its "resting" state. Active listening builds rapport, establishes trust, and returns the caller to a state of de-escalation and rest.

Related Category: [Racial/Cultural/Bias](#), [Mental Health](#), [Threatening/Offensive/Aggressive Suicide](#)

Title: [Counseling Soft Skills are Different from Hard Skills, and Just as Important](#)

Author/Source: SHIP TA Center

Date: 2021

Format: Webinar

Description: Medicare counseling involves not just a knowledge of Medicare ("hard" skills), but also the ability to communicate effectively ("soft" skills). This webinar focuses on key soft skills that can enhance Medicare counseling sessions for you and your clients. You will learn how soft skills are as important as hard skills, especially for those in the helping professions.

Related Category: [Threatening/Offensive/Aggressive](#)

Title: [Five Tips Help Counselors Engage Beneficiaries by Phone](#)

Author/Source: SHIP TA Center

Date: 2020

Format: Article

Description: Describes five strategies for more effective communication by telephone.

Title: [Not all SHIP Counseling Sessions are Created Equal](#)

Author/Source: SHIP TA Center

Date: 2020

Format: Article

Description: This article describes approaches to minimizing possible “hurdles,” or beneficiary contact challenges, and their impact.

Title: [Counseling Soft Skills are Different from Hard Skills, and Just as Important](#)

Author/Source: SHIP TA Center

Date: 2019

Format: Article

Description: Beneficiaries or caregivers may come to a Medicare counseling session in an emotional or behavioral state that can create hurdles. It is important to recognize possible hurdles as well as approaches to minimize their impact.

Related Category: [Threatening/Offensive/Aggressive](#)

Title: [Connecting with Beneficiaries: Communication Techniques for Medicare Counselors](#)

Author/Source: SHIP TA Center

Date: 2018

Format: Webinar

Description: This webinar looks at effective communication techniques that are essential to the process of counseling beneficiaries. Additional tips were provided to de-escalate a difficult situation and maintain a person-centered conversation with challenging clients.

Title: [Becoming an I&R Wizard: Identifying and Empowering Problem Callers](#)

Author/Source: Inform USA

Date: 2017

Format: Webinar

Description: When people need help and don't know where to turn, they follow the yellow brick road to their local I&R Wizard and expect a miracle. Experienced I&R Specialists know there isn't any magic - just hard work and a lot of resources. This session helps beginning and intermediate I&R Specialists identify the different personalities of potential problem callers who have trouble realizing their own potential. Whether they are Cowardly Lions, Scarecrows or Tin Men, this session helps Specialists overcome barriers and empower callers to pool together referrals with their own resources and problem-solving skills to get to where they are going.

Title: [Coping with Challenging Clients](#)

Author/Source: American Psychological Association, Vol 48, No. 7

Date: 2017

Format: Article

Description: This article provides psychologists with tips on how to respond effectively to challenging clients, including remaining calm, expressing empathy, reframing resistance, fostering patience with clients and themselves, and considering terminating relationships with clients.

Related Category: [Mental Health](#)

Title: [Tips On How to Handle Racist Customers](#)

Author/Source: Kelechi Okeke, CXService360

Date: 2017

Format: Article

Description: This webpage provides an overview of how to handle racist interactions with customers.

Related Category: [Racial/Cultural/Bias](#)

Title: [Biases, Boundaries & Self-Care in I&R Programs](#)

Author/Source: Sandra Ray, CRS

Date: 2017

Format: PowerPoint pdf

Description: I&R Specialists need to be acutely aware of ethics, biases and boundaries that may affect how they interact with callers. This presentation focuses on four crucial topics: (1) Hidden biases that the specialist may hold; (2) Ethics of working with callers in a polite and professional manner; (3) Establishing boundaries when working with callers who may hold values contrary to those the specialist may have; and (4) Self-care techniques that are critical for specialists as they provide services to callers on a day-in, day-out basis.

Related Category: [Racial/Cultural/Bias](#), [Professional Well-Being/Self-Care](#)

Title: [What is Trauma-Informed Care?](#)

Author/Source: Buffalo Center for Social Research, University of Buffalo

Date: 2015

Format: Article

Description: Describes Trauma-Informed Care approach and the guiding principles/values and key components of trauma-informed care to reduce re-traumatization and promote healing.

Related Category: [Professional Well-Being/Self-Care](#)

Title: [SAMHSA's Concept of Trauma and Guidance for a Trauma-Informed Approach](#)

Author/Source: SAMHSA

Date: 2014

Format: Manual

Description: The manual defines trauma and highlights the need for a trauma-informed approach when providing services and support to communities that have survived trauma. Describes ten domains organizations can use to implement a trauma-informed approach.

Related Category: [Professional Well-Being/Self-Care](#)

Title: [The Trauma-Informed Toolkit \(Second Edition\)](#)

Author/Source: Manitoba Trauma Information and Education Centre

Date: 2013

Format: Manual

Description: The toolkit is geared to service providers working with adults who have experienced or been affected by trauma. Includes information on the effects of trauma exposure on service providers, including descriptions of burnout, compassion fatigue, and secondary trauma/vicarious trauma, and managing trauma response.

Related Category: [Organizational Practices](#)

Title: [How to Use Emotion Regulation Coping Skills](#)

Author/Source: Laura K. Schenck, Ph.D., LPC

Date: 2004

Format: Article

Description: Describes “dialectical behavior therapy” or emotion regulation coping skills, including understanding one's emotions and allowing exposure to their feelings.

Related Category: [Professional Well-Being/Self-Care](#)

Title: [The Power of Customer Service Focus in Crisis Counseling](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: N/A

Format: Tip Sheet

Description: Think about your last call to your cable provider or your power company to add or change a service or sort out an issue with a bill. What made that experience good or bad? Callers to the Lifeline have those same kinds of feelings, good and bad, in response to their experiences with calling us for help, only poor results can be much more devastating for the people we serve. Customer service skills are an important but woefully overlooked tool in the crisis counselor's toolkit.

Related Category: [Mental Health](#)

Title: [Self-Disclosure on the Crisis Line](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: N/A

Format: Tip Sheet

Description: When and how do we use our personal experiences to effectively help our callers? There is some research that self-disclosure and peer support is potentially helpful to callers, but it can also be counter-productive if not handled well. What are some safe ways to use lived experience in crisis center practice?

Title: [National Adult Protective Services Training Center – Courses](#)

Author/Source: National Adult Protective Services Training Center

Date: N/A

Format: Website

Description: Courses address a range of topics including safety, communication and interviewing, mental health issues, power and control dynamics, and trauma-informed practices. An account is required to access courses.

Related Category: [Mental Health](#)

Title: [Navigating the I&R Process: Communication Approaches and Examples](#) (I&R training resource document)

Author/Source: ADvancing States

Date: Regularly updated

Format: Tip Sheet

Description: This training resource provides communication examples following the process of a front-line information and referral conversation, from greeting to closure. It includes conversation examples addressing difficult calls, empathetic statements, asking demographic questions, problem-solving, and more. The resource highlights standards for I&R practice.

Frequent (Familiar) Callers

Title: [Guidance for Supporting Familiar Individuals](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

Format: Tip Sheet

Description: Familiar individuals can evoke many reactions from crisis center staff who are supporting them. Some may become exhausted or frustrated by repeated contacts or feel helpless because it appears to them that they aren't making a measurable difference in helping the individual. Some may value the very real relationship, which includes being part of someone's daily support network, or feel comforted by seeing a familiar name, phone number, or hearing the voice of someone they enjoy talking with. Striking the balance between empathy, maintaining healthy boundaries, and setting appropriate limits is an ongoing challenge for crisis counselors and crisis center supervisors. The goal is to always listen and acknowledge the individual's concerns, conduct an assessment, and determine an appropriate intervention, including when to end the conversation.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#), [Suicide](#)

Title: [Frequent Callers: The Whole Story](#)

Author/Source: John Plonski/Inform USA (formerly AIRS)

Date: 2023

Format: PowerPoint pdf

Description: This workshop was designed to provide caregiving professionals with the knowledge and skills needed to effectively manage frequent callers. The presentation provides attendees with a comprehensive understanding of the topic, as well as practical tools and techniques for managing frequent callers in an I&R setting.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#)

Title: [Social Isolation Resources](#)

Author/Source: SMP Resource Center

Date: N/A

Format: Website

Description: A collection of resources designed to help combat social isolation among older adults and support beneficiaries and caregivers, as well as staff members and volunteers.

Racial, Cultural, Bias

Title: [An Introduction to Microaggressions: What Are They, Why Do They Matter for Medicare Services, and How to Avoid and Respond to Them](#)

Author/Source: SHIP TA Center

Date: 2023

Format: Webinar

Description: During this webinar the presenter defines microaggressions, provides examples of biased and microaggressive behaviors, and give insight into how individuals can respond to microaggressions when they are receivers/witnesses or when they engage in microaggressive behaviors.

Title: [Unconscious Bias and Microaggressions: Implications for Supporting Aging Adults and Individuals with Disabilities Workshop](#)

Author/Source: SHIP TA Center

Date: 2023

Format: Webinar

Description: During this three-hour interactive workshop, the presenter defined key language, such as bias and microaggressions, discussed examples of microaggressions and associated consequences, provided space for attendees to reflect on their personal and work experiences with microaggressions, and gave insight into how individuals can respond to microaggressions when they are receivers/witnesses or when they engage in microaggressive behaviors.

Title: [How to Identify Microaggressions](#)

Author/Source: SHIP TA Center

Date: 2023

Format: Article

Description: The article provides examples of microaggressions and a graphic designed to help in understanding how power and marginalization can vary depending on categories related to power and privilege.

Title: [The Effectiveness of Active Listening in a Crisis: Why it Works](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Have you ever wondered why we perform active listening as de-escalation in a crisis and why this is effective? This presentation will outline what happens in the brain when a person is in a crisis state and why active listening can restore neocortical functioning. The presenter will discuss the evolution of a crisis state and the changes in the brain during the build-up to a crisis when a person is in an active crisis state. The presenter will review how to practice active listening with a caller and how this technique de-escalates and restores the brain to its "resting" state. Active listening builds rapport, establishes trust, and returns the caller to a state of de-escalation and rest.

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Title: [Biases, Boundaries & Self-Care in I&R Programs](#)

Author/Source: Sandra Ray, CRS

Date: 2017

Format: PowerPoint pdf

Description: I&R Specialists need to be acutely aware of ethics, biases and boundaries that may affect how they interact with callers. This presentation focuses on four crucial topics: (1) Hidden biases that the specialist may hold; (2) Ethics of working with callers in a polite and professional manner; (3) Establishing boundaries when working with callers who may hold values contrary to those the specialist may have; and (4) Self-care techniques that are critical for specialists as they provide services to callers on a day-in, day-out basis.

Related Category: [Techniques for Front-Line Staff](#), [Professional Well-Being/Self-Care](#)

Title: [Tips On How to Handle Racist Customers](#)

Author/Source: Kelechi Okeke, CXService360

Date: 2017

Format: Website

Description: Provides an overview of how to handle racist interactions with customers.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Responding to Microaggressions and Unconscious Bias](#)

Author/Source: National Equity Project

Format: Website

Description: Discusses microaggressions and unconscious bias and how to respond if necessary. Gives example responses.

Related Category: [Threatening/Offensive/Aggressive](#)

Mental Health

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Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

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Author/Source: 988 Suicide & Crisis Lifeline

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Related Category: [Techniques for Front-Line Staff](#), [Frequent \(Familiar\) Callers](#), [Suicide](#)

Title: [Working with and Through Psychosis: Considerations for APS](#) (training materials)

Author/Source: San Diego State University School of Social Work, Academy for Professional Excellence

Date: 2023

Format: PowerPoint and more

Description: This course provides APS professionals with foundational knowledge and tools needed to work effectively with individuals actively experiencing serious mental health symptoms, such as psychosis. Includes trainer and participant manuals, PPT and audio. © 2023. San Diego State University School of Social Work, Academy for Professional Excellence

Title: [Frequent Callers: The Whole Story](#)

Author/Source: John Plonski/Inform USA (formerly AIRS)

Date: 2023

Format: PowerPoint pdf

Description: This workshop was designed to provide caregiving professionals with the knowledge and skills needed to effectively manage frequent callers. The presentation provides attendees with a comprehensive understanding of the topic, as well as practical tools and techniques for managing frequent callers in an I&R setting.

Related Category: [Techniques for Front-Line Staff](#), [Frequent \(Familiar\) Callers](#)

Title: [Responding to Angry Expressions During Crisis Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2023

Format: Tip Sheet

Description: Anger is often used as a mechanism to cope with complex emotions. Anger and frustration are common responses to heightened emotional states, such as stress, fear, and sadness. Individuals who are expressing anger may also be struggling with feeling misunderstood, as though their needs are not being met, or as though they have lost control of their life. Regardless of the reasons behind the anger, it is important that crisis counselors respond to individuals in ways that validate their emotional experience and empower them to move through the crisis.

Related Category: [Techniques for Front-Line Staff](#), [Threatening/Offensive/Aggressive](#)

Title: [How Can I De-Escalate a Situation When Someone is Angry or Agitated?](#)

Author/Source: NSW.Gov

Date: 2023

Format: Article

Description: This brief article outlines a 7-step process for working with an agitated or angry person. The acronym "LOWLINE" is used to outline each of the seven steps.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Solving the 7 Hardest Customer Service Scenarios \(Examples + Best Practices\)](#)

Author/Source: Userlike

Date: 2022

Format: Article

Description: Describes “7 toughest customer service scenarios”, including when a customer displays racism, sexism, or is aggressive, and “best practices” on suggested responses.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Using Your Janet Jackson Voice - Managing Difficult Callers](#)

Author/Source: Inform USA Webinar

Date: 2022

Format: YouTube video

Description: "Wouldn't Life Be Much Better If We All Spoke At A Whisper Like Janet Jackson? No, seriously." - King Sukii, Associate Editor at Globalgrind, Posted July 6, 2018. Tone of voice is very important. Community Resource Specialists may answer over 100 calls a day. Every person who

calls has a unique situation, most of the calls are pleasant but we all have had the "difficult caller." In this session, you will learn that a lower tone of voice is one of the most effective ways to express empathy. Techniques for calming a client who is indignant or extremely emotional are discussed. You will find your tone of voice that is appropriate to address difficult callers.

Related Category: [Techniques for Front-Line Staff](#), [Threatening/Offensive/Aggressive](#)

Title: [Providing Crisis Support Through Text and Chat](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: This presentation will help participants understand and recognize best practice considerations when serving individuals who reach out through text-based services and may be experiencing a crisis by helping responders better understand what makes text-based crisis counseling unique and what mindset to bring to the contacts you'll have on a shift. There is a great deal of overlap for voice-based and text-based crisis services. Both are available for people in crisis and aim to provide support, build connections, and increase safety. By providing services over text-based modalities in addition to a phone line, we can help more people, many of whom would never use a phone line.

Related Category: [Techniques for Front-Line Staff](#), [Suicide](#)

Title: [The Effectiveness of Active Listening in a Crisis: Why it Works](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Have you ever wondered why we perform active listening as de-escalation in a crisis and why this is effective? This presentation will outline what happens in the brain when a person is in a crisis state and why active listening can restore neocortical functioning. The presenter will discuss the evolution of a crisis state and the changes in the brain during the build-up to a crisis when a person is in an active crisis state. The presenter will review how to practice active listening with a caller and how this technique de-escalates and restores the brain to its "resting" state. Active listening builds rapport, establishes trust, and returns the caller to a state of de-escalation and rest.

Related Category: [Techniques for Front-Line Staff](#), [Racial, Cultural, Bias](#), [Threatening/Offensive/Aggressive](#), [Suicide](#)

Title: [Coping with Challenging Clients](#)

Author/Source: American Psychological Association, Vol 48, No. 7

Date: 2017

Format: Article

Description: This article offers psychologists tips for responding effectively to challenging clients, including remaining calm, expressing empathy, reframing resistance, fostering patience with clients and themselves, and considering terminating relationships with clients.

Related Category: [Techniques for Front-Line Staff](#)

Title: [The Power of Customer Service Focus in Crisis Counseling](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: N/A

Format: Tip Sheet

Description: Think about your last call to your cable provider or your power company to add or change a service or sort out an issue with a bill. What made that experience good or bad? Callers to the Lifeline have those same kinds of feelings, good and bad, in response to their experiences with calling us for help, only poor results can be much more devastating for the people we serve. Customer service skills are an important but woefully overlooked tool in the crisis counselor's toolkit.

Related Category: [Techniques for Front-Line Staff](#)

Title: [National Adult Protective Services Training Center – Courses](#)

Author/Source: National Adult Protective Services Training Center

Date: N/A

Format: Website

Description: Courses address a range of topics including safety, communication and interviewing, mental health issues, power and control dynamics, and trauma-informed practices. An account is required to access courses.

Related Category: [Techniques for Front-Line Staff](#)

Threatening, Offensive, Aggressive

Title: [Responding to Abusive Behavior During 988 Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

Format: Tip Sheet

Description: Abusive, harassing, or sexually motivated contacts to the Lifeline can be very challenging to manage, both clinically and operationally. Some contacts can become quite disruptive to the operation and exhausting to the staff. A provocative individual can evoke certain reactions from counselors even when experienced and well-trained. Some crisis counselors may endure an abusive or harassing conversation and continue attempting to try to make progress with such an individual for an extended period of time. Some will have a lower tolerance for what may be perceived as a prank or abuse of the service and quickly end the contact, even if it may be premature to do so. Striking the balance between empathy and limit-setting is an ongoing challenge for counselors and supervisors.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#), [Suicide](#)

Title: [Responding to Angry Expressions During Crisis Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2023

Format: Tip Sheet

Description: Anger is often used as a mechanism to cope with complex emotions. Anger and frustration are common responses to heightened emotional states, such as stress, fear, and sadness. Individuals who are expressing anger may also be struggling with feeling misunderstood, as though their needs are not being met, or as though they have lost control of their life. Regardless of the reasons behind the anger, it is important that crisis counselors respond to individuals in ways that validate their emotional experience and empower them to move through the crisis.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#)

Title: [Say What?! How To Communicate Anything to Anyone](#)

Author/Source: Inform USA Webinar

Date: 2022

Format: Webinar

Description: Communication is key. But what happens when the people communicating are speaking different languages? Learn what type of communicator you are and how to reach across that divide to influence others who communicate differently. Combining communication skills, NLP (Neuro Linguistic Programming), improvisation, and psychology will imbue the

audience with new skills and understanding to ensure their message is heard, effective, and productive. Whether between coworkers, team members, bosses, or in front of an audience, this workshop will improve your game and allow you to accomplish more without misunderstanding and confusion. This presentation is for anyone who wants to learn more about communication style, conscious communication, thinking on their feet, direct and inferred communication, and how to get what you want with different personality types.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Dread Them No More - Working with Challenging Calls](#)

Author/Source: Inform USA

Date: N/A

Format: Webinar

Description: Working with challenging calls can be one of the most difficult tasks required of Community Resource Specialists. The reasons a call may be challenging can vary; as such, different approaches and techniques will be more or less effective depending on the caller type. In this workshop, presenters discuss various categories of challenging calls, discuss approaches to tackling the challenges presented, and role-play several scenarios.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Managing Difficult Calls: Looking in The Mirror](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: This workshop addresses the one component of difficult calls that specialists can control - themselves. Accepting that there is no way to ensure difficult calls will never happen, this introspective look into how we view our work will empower us to be able to assertively address our behaviors, reactions, and emotions in a way that will mitigate the impact of difficult calls have on our agencies and us.

Related Category: [Techniques for Front-Line Staff](#)

Title: [CPI's \(Crisis Prevention Institute\) Top Ten De-escalation Tips Revised](#)

Author/Source: Crisis Prevention Institute

Date: 2022

Format: Website

Description: This webpage from CPI provides 10 steps to de-escalation for a strong and more supportive work environment.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Using Your Janet Jackson Voice - Managing Difficult Callers](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: "Wouldn't Life Be Much Better If We All Spoke At A Whisper Like Janet Jackson? No, seriously." - King Sukii, Associate Editor at Globalgrind, Posted July 6, 2018. Tone of voice is very important. Community Resource Specialists may answer over 100 calls a day. Every person who calls has a unique situation, most of the calls are pleasant but we all have had the "difficult caller." In this session, you will learn that a lower tone of voice is one of the most effective ways to express empathy. Techniques for calming a client who is indignant or extremely emotional are discussed. You will find your tone of voice that is appropriate to address difficult callers.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#)

Title: [The Effectiveness of Active Listening in a Crisis: Why it Works](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Have you ever wondered why we perform active listening as de-escalation in a crisis and why this is effective? This presentation will outline what happens in the brain when a person is in a crisis state and why active listening can restore neocortical functioning. The presenter will discuss the evolution of a crisis state and the changes in the brain during the build-up to a crisis when a person is in an active crisis state. The presenter will review how to practice active listening with a caller and how this technique de-escalates and restores the brain to its "resting" state. Active listening builds rapport, establishes trust, and returns the caller to a state of de-escalation and rest.

Related Category: [Techniques for Front-Line Staff](#), [Racial, Cultural, Bias](#), [Mental Health](#), [Suicide](#)

Title: [Counseling Soft Skills are Different from Hard Skills, and Just as Important](#)

Author/Source: SHIP TA Center

Date: 2021

Format: Webinar

Description: Medicare counseling involves not just a knowledge of Medicare ("hard" skills), but also the ability to communicate effectively ("soft" skills). This webinar focuses on key soft skills that can enhance Medicare counseling sessions for you and your clients. You will learn how soft skills are as important as hard skills, especially for those in the helping professions.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Counseling Soft Skills are Different from Hard Skills, and Just as Important](#)

Author/Source: SHIP TA Center

Date: 2019

Format: Article

Description: Beneficiaries or caregivers may come to a Medicare counseling session in an emotional or behavioral state that can create hurdles. It is important to recognize possible hurdles as well as approaches to minimize their impact.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Responding to Microaggressions and Unconscious Bias](#)

Author/Source: National Equity Project

Date: N/A

Format: Website

Description: Discusses microaggressions and Unconscious bias and how to respond if necessary. Gives example responses.

Related Category: [Racial/Cultural/Bias](#)

Suicide

Title: [Guidance for Supporting Familiar Individuals](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

Format: Tip Sheet

Description: Familiar individuals can evoke many reactions from crisis center staff who are supporting them. Some may become exhausted or frustrated by repeated contacts or feel helpless because it appears to them that they aren't making a measurable difference in helping the individual. Some may value the very real relationship which includes being part of someone's daily support network or feel comforted by seeing a familiar name, phone number, or hearing the voice of someone they enjoy talking with. Striking the balance between empathy, maintaining healthy boundaries, and setting appropriate limits is an ongoing challenge for crisis counselors and crisis center supervisors. The goal is to always listen and acknowledge the individual's concerns, conduct an assessment, and determine an appropriate intervention, including when to end the conversation.

Related Category: [Techniques for Front-Line Staff](#), [Frequent \(Familiar\) Callers](#), [Mental Health](#)

Title: [Responding to Abusive Behavior During 988 Conversations](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2024

Format: Tip Sheet

Description: Abusive, harassing, or sexually motivated contacts to the Lifeline can be very challenging to manage, both clinically and operationally. Some contacts can become quite disruptive to the operation and exhausting to the staff. A provocative individual can evoke certain reactions from counselors even when experienced and well-trained. Some crisis counselors may endure an abusive or harassing conversation and continue attempting to try to make progress with such an individual for an extended period of time. Some will have a lower tolerance for what may be perceived as a prank or abuse of the service and quickly end the contact, even if it may be premature to do so. Striking the balance between empathy and limit-setting is an ongoing challenge for counselors and supervisors.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#), [Threatening/Offensive/Aggressive](#)

Title: [Providing Crisis Support Through Text and Chat](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: This presentation will help participants understand and recognize best practice considerations when serving individuals who reach out through text-based services and may be experiencing a crisis by helping responders better understand what makes text-based crisis counseling unique and what mindset to bring to the contacts you'll have on a shift. There is a great

deal of overlap for voice-based and text-based crisis services. Both are available for people in crisis and aim to provide support, build connections, and increase safety. By providing services over text-based modalities in addition to a phone line, we can help more people, many of whom would never use a phone line.

Related Category: [Techniques for Front-Line Staff](#), [Mental Health](#)

Title: [The Effectiveness of Active Listening in a Crisis: Why it Works](#)

Author/Source: Inform USA

Date: 2022

Format: Webinar

Description: Have you ever wondered why we perform active listening as de-escalation in a crisis and why this is effective? This presentation will outline what happens in the brain when a person is in a crisis state and why active listening can restore neocortical functioning. The presenter will discuss the evolution of a crisis state and the changes in the brain during the build-up to a crisis when a person is in an active crisis state. The presenter will review how to practice active listening with a caller and how this technique de-escalates and restores the brain to its "resting" state. Active listening builds rapport, establishes trust, and returns the caller to a state of de-escalation and rest.

Related Category: [Techniques for Front-Line Staff](#), [Racial, Cultural, Bias](#), [Mental Health](#), [Threatening/Offensive/Aggressive](#)

Professional Well-Being/Self-Care

Title: [Crisis Counselor Self-Care](#)

Author/Source: 988 Suicide & Crisis Lifeline

Date: 2023

Format: Tip Sheet

Description: Whether you're new to the field or experienced, you know the importance of self-care. Some think this just means taking vacations or having spa days, and if you don't have enough time/money then you can't practice self-care. In actuality, self-care is more about how you weave wellness into your everyday life, including while working/volunteering. Self-care is Lifeline, but also so your compassion satisfaction your reason for becoming a crisis counselor, you want the work to feel rewarding. outweighs your compassion fatigue. Whatever your reason for becoming a crisis counselor, you want the work to feel rewarding.

Title: [Deliberate Self-Care](#)

Author/Source: Inform USA

Date: 2023

Format: Webinar

Description: Experiencing daily stress can affect our brains and can lead to burnout/vicarious trauma/compassion fatigue. Learn how intentional self-care can un-do these stress effects and instill resiliency in our brains. You will receive practical solutions for self-care and how they will build strength and resiliency in your mind and body.

Title: [Foundational and Practical Self-Care](#)

Author/Source: Inform USA

Date: 2023

Format: Webinar

Description: This presentation covers the foundational concepts of self-care and practical techniques and strategies for staff self-care activities and includes useful preventative strategies and techniques for managing difficult emotions before and after phone calls.

Title: [Self-Care Strategies to Sustain You in Your Work](#)

Author/Source: SHIP TA Center

Date: 2022

Format: Webinar

Description: This webinar explores the causes and signs of disengagement that may develop from job-related stressors, gain understanding of self-care beyond buzz words, and leave with tools to create a personalized plan for self-care.

Title: [Being Resilient Through COVID and Beyond](#)

Author/Source: SHIP TA Center

Date: 2021

Format: Webinar

Description: In these workshops, you will find a roadmap to resilience that is easy to follow, provides concrete steps, and gives you simple techniques for managing changes that are impacting your life.

Title: [Workshop 1: A Shot of Resilience - Part A Recording](#)

Author/Source: NCOA, SHIP TA Center, SMP Resource Center

Date: 2021

Format: Webinar

Description: In these workshops, you will find a roadmap to resilience that is easy to follow, provides concrete steps, and gives you simple techniques for managing changes that are impacting your life.

Title: [Workshop 1: A Shot of Resilience - Part B Recording](#)

Author/Source: NCOA, SHIP TA Center, and SMP Resource Center

Date: 2021

Format: Webinar

Description: In these workshops, you will find a roadmap to resilience that is easy to follow, provides concrete steps, and gives you simple techniques for managing changes that are impacting your life.

Title: [Workshop 2: A Shot of Resilience](#)

Author/Source: NCOA, SHIP TA Center, and SMP Resource Center

Date: 2021

Format: Webinar

Description: In these workshops, you will find a roadmap to resilience that is easy to follow, provides concrete steps, and gives you simple techniques for managing changes that are impacting your life.

Title: [Stress Management Techniques, Health Coping Strategies, Breathing Exercises](#)

Author/Source: SAMSHA

Date: 2019

Format: Video

Description: This Substance Abuse and Mental Health Services (SAMHSA) Disaster Technical Assistance (DTAC) video provides tips for Crisis Counseling Assistance and Training Program (CCP) staff on self-care and boundaries between survivors and CCP staff. It is meant to help staff understand the personal impact of working with disaster survivors. It also covers the importance of practicing self-care and demonstrates a breathing exercise that may help staff reduce stress.

Title: [Crisis Counseling Skills](#)

Author/Source: SAMSHA

Date: 2019

Description: Video

This Substance Abuse and Mental Health Services (SAMHSA) Disaster Technical Assistance (DTAC) video demonstrates exemplary crisis counseling skills such as active listening and provides Crisis Counseling Assistance and Training Program (CCP) staff with tips for working with survivors through all stages of recovery. It depicts role play scenarios and provides suggestions to improve active listening skills and help CCP staff assist angry survivors.

Title: [Biases, Boundaries & Self-Care in I&R Programs](#)

Author/Source: Sandra Ray, CRS

Date: 2017

Format: PowerPoint pdf

Description: I&R Specialists need to be acutely aware of ethics, biases and boundaries that may affect how they interact with callers. This presentation focuses on four crucial topics: (1) Hidden biases that the specialist may hold; (2) Ethics of working with callers in a polite and professional manner; (3) Establishing boundaries when working with callers who may hold values contrary to those the specialist may have; and (4) Self-care techniques that are critical for specialists as they provide services to callers on a day-in, day-out basis.

Related Category: [Techniques for Front-Line Staff](#), [Racial/Cultural/Bias](#)

Title: [What is Trauma-Informed Care?](#)

Author/Source: Buffalo Center for Social Research, University of Buffalo

Date: 2015

Format: Article

Description: Describes Trauma-Informed Care approach and the guiding principles/values and key components of trauma-informed care to reduce re-traumatization and promote healing.

Related Category: [Techniques for Front-Line Staff](#)

Title: [SAMHSA's Concept of Trauma and Guidance for a Trauma-Informed Approach](#)

Author/Source: SAMSHA

Date: 2014

Format: Manual

Description: The manual defines trauma and highlights the need for a trauma-informed approach when providing services and support to communities that have survived trauma. Describes ten domains organizations can use to implement a trauma-informed approach.

Related Category: [Techniques for Front-Line Staff](#)

Title: [How to Use Emotion Regulation Coping Skills](#)

Author/Source: Laura K. Schenck, Ph.D., LPC

Date: 2004

Format: Article

Description: Describes “dialectical behavior therapy” or emotion regulation coping skills, including understanding one's emotions and allowing exposure to their feelings.

Related Category: [Techniques for Front-Line Staff](#)

Title: [Secondary Traumatic Stress](#)

Author/Source: Administration for Children and Families

Date: N/A

Format: Website

Description: Describes compassion fatigue, or secondary traumatic stress disorder, as “a natural but disruptive by-product of working with traumatized clients. It is a set of observable reactions to working with people who have been traumatized and mirrors the symptoms of post-traumatic stress disorder.” Provides examples of common symptoms of compassion fatigue and examples of intervention strategies and approaches.

Title: [Take Better Care of YOU: What Self-Care is and How to Embrace its 5 Dimensions](#)

Author/Source: Anna Gratte

Date: N/A

Format: Article

Description: Self-care is an important daily activity that should not be overlooked or treated lightly, particularly if you’re busy juggling a business and a family. This article describes five dimensions of self-care: physical, emotional, social, intellectual, and spiritual.

Organizational Practices

Title: [The Seven Steps of Critical Incident Stress Debrief to Support Trauma Recovery](#)

Author/Source: Better Health

Date: 2024

Format: Website

Description: This article from Better Health examines the impacts of critical incidents and provides a 7-step model for critical incident stress debriefings.

Title: [988 Suicide and Crisis Lifeline Suicide Safety Policy](#)

Author/Source: Vibrant Emotional Health

Date: 2022

Format: Policy

Description: All Lifeline crisis centers shall have a written policy that specifically addresses actions to be undertaken by crisis counselors in working with those at risk of suicide that is consistent with the Lifeline Suicide Safety Policy. Requirements include: Assessment and Intervention; Supervisory Support and Training; and Community Engagement.

Related Category: N/A

Title: [Part 1: Coping with Organizational Stress](#)

Author/Source: SHIP TA Center

Date: 2021

Format: Webinar

Description: This two-part presentation examines a model called the “7 Commitments”, which was developed by Sandra Bloom and is based on trauma theory. The Commitments have been found to help organizations develop some degree of immunity from the negative impacts of stress.

Title: [Part 2: Coping with Organizational Stress](#)

Author/Source: SHIP TA Center

Date: 2021

Format: Webinar

Description: This two-part presentation examines a model called the “7 Commitments”, which was developed by Sandra Bloom based on trauma theory. The Commitments have been found to help organizations develop some degree of immunity from the negative impacts of stress.

Title: [Debriefing Techniques: How to Use Them for Prevention](#)

Author/Source: Crisis Prevention Institute

Date: 2017

Format: Website

Description: This guide provides an overview of CPI's COPING comprehensive model for dealing with critical incidents and the steps for supporting not only staff but the agency as well.

Title: [The Trauma-Informed Toolkit \(Second Edition\)](#)

Author/Source: Manitoba Trauma Information and Education Centre

Date: 2013

Format: Manual

Description: The toolkit is geared to service providers working with adults who have experienced or been affected by trauma. Includes information on the effects of trauma exposure on service providers, including descriptions of burnout, compassion fatigue, and secondary trauma/vicarious trauma, and managing trauma response.

Related Category: [Techniques for Front-Line Staff](#)

Contributing Organizations

The table that begins on the next page features the organizations that contributed to this resource list. The names of individual work group members from these contributing organizations follows.

Organization	Website	Description	Contact
ADvancing States	advancingstates.org	ADvancing States is the national non-profit association representing and supporting the nation's 56 state and territorial agencies on aging and disabilities and long-term services and supports directors.	info@advancingstates.org

Organization	Website	Description	Contact
ADvancing States	advancingstatesiq.org	Advancing States iQ Online Learning Center is designed to help strengthen participants' knowledge of the aging and disability networks, our online courses provide overviews and analyses of systems and services that impact older adults, people with disabilities, and their caregivers.	See website
Alzheimer's Association	alz.org	The Alzheimer's Association leads the way to end Alzheimer's and all other dementia — by accelerating global research, driving risk reduction and early detection, and maximizing quality care and support.	Complete online form at alz.org/contactus
Inform USA	.informusa.org	Inform USA (formerly the Alliance of Information & Referral Systems (AIRS) is the professional membership association for community navigation or Information and Referral (I&R). Inform USA drives quality and connection in the sector as the sole source for standards, program accreditation, and practitioner certification. Events and training resources are available at no cost or a reduced fee to Inform USA members and for a fee to non-members.	Complete online form at informusa.org/contact-us
NCOA	ncoa.org	The National Council on Aging (NCOA) is a national non-profit organization focused on older adults.	centerforbenefits@ncoa.org
NCOA Connect	connect.ncoa.org	NCOA Connect offers webinars for aging professionals on varied topics.	See website

Organization	Website	Description	Contact
SHIP Technical Assistance Center	shiphelp.org	State Health Insurance Assistance Programs (SHIPs) provide local, unbiased help to Medicare beneficiaries, their families, and caregivers. The national SHIP Technical Assistance Center at Northeast Iowa Area Agency on Aging (nei3a.org) is a central source of information for and about the 54 SHIP programs located in all 50 states, the District of Columbia, Guam, Puerto Rico, and the U.S. Virgin Islands.	info@shiptacenter.org
SMP Resource Center	smpresource.org	Senior Medicare Patrols (SMPs) empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors, and abuse. The national SMP Resource Center at Northeast Iowa Area Agency on Aging (nei3a.org) serves the 54 SMP programs located throughout the country, including the District of Columbia, Guam, Puerto Rico, and the U.S. Virgin Islands. The SMP Resource Center also promotes national visibility for the SMP program and helps the general public locate their state SMP project.	Complete online form at smpresource.org/you-can-help/report-fraud

Organization	Website	Description	Contact
USAgging	usaging.org	USAgging is the national association representing and supporting the network of Area Agencies on Aging and advocating for the Title VI Native American Aging Programs. Our members help older adults and people with disabilities throughout the United States live with optimal health, well-being, independence and dignity in their homes and communities.	info@usaging.org
Eldercare Locator	usaging.org/eldercareloc	USAgging's Eldercare Locator , funded by the U.S. Administration for Community Living (ACL) is the only national information and referral resource to provide support to consumers across the spectrum of issues affecting older Americans.	See website
Disability Information and Access Line	usaging.org/dialconnect	USAgging's Disability Information and Access Line (DIAL) funded by the U.S. Administration for Community Living and the Centers for Disease Control and Prevention, assists people with disabilities get vaccinated by providing assistance in finding COVID-19 vaccination sites, determining whether in-home vaccination is available, educating callers about general COVID-19 vaccine information, and finding ways to help overcome both physical and systemic barriers to accessing the COVID-19 vaccine. DIAL also helps people with disabilities identify, locate, and access community services and supports.	See website

Organization	Website	Description	Contact
988 Suicide & Crisis Lifeline	988lifeline.org	The 988 Lifeline provides 24/7, free and confidential support for people in distress, prevention and crisis resources for you or your loved ones, and best practices for professionals in the United States.	Complete online form at 988lifeline.org/contact-the-lifeline
Vibrant Emotional Health	vibrant.org	Vibrant Emotional Health operates innovative community programs for people at all stages of life, and state-of-the-art crisis lines like the 988 Suicide & Crisis Lifeline (formerly known as the National Suicide Prevention Lifeline). The Alliance also provides public education, training and technical assistance to various mental health providers and social service systems and strives to expand the number of people served and training providers to meet the unique needs of older adults.	See website

Work Group Members

Work group members, present and past, are listed below.

1. Kristin Helfer Koester (ADvancing States)
2. Nanette Relave (ADvancing States)
3. Mariam Schrage (Alzheimer's Association)
4. Sandra Ray (Inform USA)
5. Brandy Bauer (NCOA)
6. Darren Hotton (NCOA)
7. Jennifer Teague (NCOA)
8. Dennis Smithe (SHIP Technical Assistance Center)
9. Ginny Paulson (SHIP Technical Assistance Center)
10. Ashley Wilson (SMP Resource Center)
11. Nicole Liebau (SMP Resource Center)
12. Zachary Trammel (USAgings - DIAL)
13. Megan Stone (Vibrant Emotional Health)
14. Miranda DelVecchio (Vibrant Emotional Health)

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