



Making the Move: The Beginner’s Guide to I&R Chat

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Background

What is I&R Chat?

Online chat refers to any kind of communication over the Internet that offers a real-time direct transmission of text-based messages from sender to receiver. It is different from text messaging in that it does not necessarily involve messaging from mobile phones, or fixed or portable devices over a phone network.

Why Now?

Cultural and technological trends have led to a growing preference for text-based communication over verbal communication. As a result, phone-based services are falling out of favor with some audiences, especially young people. In order to prepare for both the present and the future, many I&R services are developing text-based alternatives to talk lines.

In 2013, AIRS completed a study of 332 I&R service providers about the importance of chat in I&R. Only 12% of the respondents said they currently provide chat but more than 50% of the respondents said that the service is of “absolute” importance in the immediate future.

Do You *Need* to Change?

While chat is a great tool, it may not be a good fit for every community. Chat works best in service areas where there is a younger demographic or where the population is comfortable with technology. This includes many cities and densely populated areas. However, the AIRS study shows that when Area Agencies on Aging started using chat, it was also used by caregivers, some of whom were themselves older adults. This indicates that the platform is not exclusive to any preconceived demographic.

AIRS Standards

The following AIRS Standards apply to text and chat in the same manner as telephone or in-person contacts:

The I&R service ensures through training and supervision that I&R specialists:

- *Identify themselves and their program per agency guidelines;*
- *Establish rapport with the inquirer and use active listening skills and empathy to discern the presenting problem;*
- *Respond to each inquirer in a professional, nonjudgmental, culturally appropriate and timely manner;*
- *Use jargon-free language and an appropriate tone of voice and inflection to convey empathy and engagement with the inquirer's situation;*
- *Make an accurate assessment of the inquirer's problems and needs asking relevant questions to elicit information necessary for an accurate referral;*
- *Explore whether there are specific preferences or requirements such as language needs, evening or weekend hours, low cost services, or disability access;*
- *Clarify and confirm the inquirer's need(s) using techniques such as paraphrasing before providing referrals;*
- *Present the inquirer with various approaches to addressing the problem that give them a range of options;*
- *Explore the inquirer's own resources (e.g., friends, family, faith-based) Effectively use the resource information system to identify resources to meet the inquirer's needs;*
- *Where possible and practical, provide at least three referrals to give the inquirer a choice (and to protect the I&R service from being perceived as making a "recommendation") while being careful not to overwhelm the inquirer with too many options;*
- *Suggest ways the inquirer can advocate for him or herself, when appropriate (empowerment);*
- *If demographic information is being collected that is not directly relevant to the assessment, e.g., if required by contract or to enhance community reports, provide an explanation to the inquirer about why the information is needed;*
- *Encourage inquirers to call back if the information proves incorrect, inappropriate, or insufficient to link them with the needed service(s); and*
- *Accurately record the disposition of the inquiry as well as the problems and needs that were addressed for use in reports.*

AIRS Standard 1

The I&R service ensures that staffing is structured to meet the needs of callers, i.e., that the optimum number of staff are available at the times most inquiries occur.

AIRS Standard 3

The I&R service uses technology that improves access to information and enhances its ability to serve inquirers efficiently and effectively. The main role of technology is to enhance and strengthen information sharing while accommodating people's communication preferences. "Technology" includes systems, telecommunications, computer systems and applications, instant messaging (IM), text/SMS messaging, online chat, video relay/chat, social media I&R software platforms, electronic directories and self-service mechanisms such as automated attendants/interactive voice response systems, video relay services, community kiosks and searchable I&R databases on the Internet.

AIRS Standard 25

Preparing for Chat: 4 Key Areas

For many I&R services, adopting chat will be a major undertaking. Most organizations will need to review the following areas before they are ready for chat:

Technology

The technology you choose will affect your entire chat model. There are two main technology modules: those outside of your phone system and those inside of your phone system.

Chat modules outside your phone system are best for I&R providers whose primary delivery model is not phone-based or for providers with adequate staffing levels to dedicate to chat. Chat modules within the phone system allow for different media to be queued and for the technology to route the various media types to the correct staff. Setting skill-based routing in your phone system is recommended.

Different technology systems will have different features. In general, pre-chat surveys and canned response are particularly useful features:

Pre-chat surveys. Most chat software programs allow you to customize a set of questions that a chat client is asked prior to entering the chat. The information collected can be optional or made mandatory for a client to complete before they are connected. Typical information requested in a pre-chat survey might include:

- ZIP code – needed to confirm the general location of the client
- Name or pseudonym –allows the I&R/chat specialist to use the client's name to establish a better rapport
- Email address and/or phone number – allows the chat specialist to reach out to the client if there is technical difficulty and a chat drops suddenly. This could be included as an optional

field and include an explanation as to why you are requesting this information from the client.

- Presenting issue – allows the client to share the type of help they are seeking and gives the chat specialist a place to start the assessment.

Canned responses. The I&R Specialist can save frequently used phrases such as a common greeting or closing statements. Be careful when using canned responses since they can come across to the client as stiff and scripted, and the longer they are, the more “canned” they will appear.

Staff Skill Sets

Every I&R staff member providing chat should be a trained I&R Specialist, but not all I&R Specialists need be trained to provide chat.

Verbal communication and written communication are very different skills. Some I&R Specialists may find themselves unable to effectively translate their verbal skills to the chat medium.

Essential skills for chat include:

- Multi-tasking under pressure
- Strong written communication skills
- Strong typing skills (speed is helpful but accuracy even more so)
- Previous experience using IM or other chat services will also help an I&R Specialist adapt more quickly to the medium
- Good grammar and reading comprehension
- Strong social-media listening skills

Reporting

Adding a chat service will add a new dimension to reporting. Keeping track of the increases and decreases of your chat channel are important. Do not forget to add them to your on-going reporting. If you add chat, you will want to show the different media channels on your report separately, but you can total all inquiries as your total contacts annually. You might be surprised that once you open additional channels how your phone call volume will change over time.

Hours of Operation

Establishing clear hours of operation for your chat is important. Not having clearly posted hours, rules of engagement, and a privacy policy, will confuse and in some cases anger, would-be inquirers.

Questions to consider regarding hours include:

- Based on your staffing model, what hours of operation will your chat be available?
- When are the staff with the required skills available to work?

- Do your after-hours staff have the skill for chat?

Staffing Capacity

The capacity of your I&R service to handle an additional media channel is an important question to ponder in deciding whether to add “live chat” to your service delivery model. How you will staff depends on how you plan to deploy your chat module. You should be adequately staffed to answer in a timely manner phone and/or chat request from inquirers.

Questions to consider include:

- Do you have the appropriate staffing levels to add another media channel to your I&R service delivery?
- If you are not able to handle the current capacity of inquiries into your I&R center, how will you manage adding chat?

Technology Guide

Technology is a key component of a chat program. This section will help to de-mystify the solutions available for chat.

Introduction to Chat Software

You may decide that some software products are better than others in certain areas. It then becomes a question of your priorities regarding which functions are most important to your organization and community. And sometimes, people just simply prefer the operation of one over another.

Technology implementation is one of the most important components of a chat program, and finding the right solution can be a daunting task for those who are not tech experts.

Since I&R centers can be so different from one another, no single solution will suit every organization. For this reason, a chat technology strategy will require research.

However, the following questions will help to de-mystify the technology strategizing process:

- *Do you have a way to access chat software through your current call center software?*

You may have a solution readily available and not even know it. Contact your I&R software provider and to see if they can accommodate your needs. If a solution is available, you will be able to save considerable time and expense in the project implementation phase, provided that the solution is a good fit.

- *If you use a third party chat tool, does it have all the features you need to support it?*

Canned responses and pre-chat surveys are commonly considered essential for chat and many centers use other features creatively for multiple purposes. Consider the following areas when shopping for features: data aggregation, multi-tasking, efficiency and service quality.

- *Is the software is reliable?*

Get in touch with colleagues who are involved with chat programs. The best information regarding software solutions will come from those sources.

Otherwise, bear in mind the following when shopping for chat software solutions:

Host Environment. When a customer comes to your website, they have an initial reaction. Ensure the solution offers a positive user experience and consistent branding with your organization.

Operator Capabilities. You need to choose a live chat support application that offers the features you need to successfully communicate with your clients.

Tracking & Monitoring. What information do you want to collect from clients, simple demographic data or something more technical? Some tools allow you to discern such information as the website that referred the clients to your site, their click-through path and the browser they use.

Ease of Use. Fortunately, the majority of chat software options do not require coding experience or extensive technical know-how. However, some are easier to use than others.

Help & Support. Many organizations that charge monthly licensing fees offer ongoing consultation with the package. This is especially important for organizations with low technological competency.

Three Examples of Specific Software Solutions

If you're still not sure about what kind of solution is best for your service, it may be helpful to look at what everyone else is doing. This section will examine three popular software solutions.

Note that this is not an endorsement of these products. For some service providers, none of the solutions listed below will be the best fit. It is important for all software options to be fully reviewed before a final product is selected.

The primary distinguishing factor in software solutions is integration. There are solutions that integrate with call center software, solutions that integrate with phone systems, and independent solutions. Integrated solutions tend to have more streamlining and efficiency benefits, while independent solutions are frequently more developed with better features. However, there are exceptions.

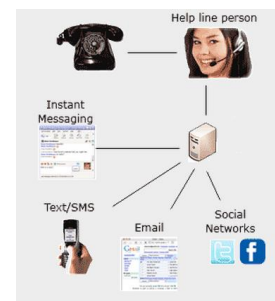
A list of advantages of each type of solution is broken out in the following section, along with an example of a specific solution for that type:

Software-integrated solution: iCarol

Some I&R software solutions have developed chat modules. iCarol is an example of this, but service providers who use other software packages should check with their providers to see if they have a chat solution available. Integration in this area would provide the following advantages:

- Securely managed data over the cloud

AIRS



- Integrated chat data that allows centers to use the same system and tools as they use for logging phone calls
- Integrated staffing and scheduling functionalities
- Network-wide reporting, so users can see trends in their chats, tune their operations, and substantiate to current and potential funders their impact
- A decreased learning curve for specialists who are already familiar with the software

Phone-integrated solution: InContact

Alternatively, some I&Rs may choose a chat system that integrates directly to their phone system. This makes call and chat queuing easier. InContact is one example of this type of solution, and provides the following benefits:

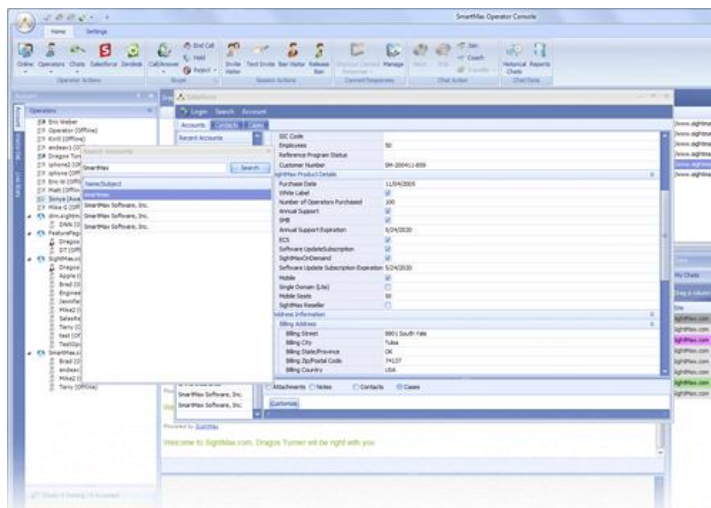
- The ability to route chats to certain staff with the best text-communication ability
- Fees that are included with phone bill, reducing administrative expenses
- Consolidated reporting that allows I&Rs to view the traffic by media type
- Integrated queue system for calls, emails, and chat



Independent solution: SightMax

Independent solutions are worthy of consideration because they tend to be more developed and have more features. A good example of a well-established chat solution is SightMax, which offers the following benefits:

- A robust system that can handle heavy processing and integration
- Abundant peer-to-peer community support
- A very stable system that is built on well-developed and tested technology
- Improved flexibility
- A greater set of features than what many other chat software providers can offer such as integration with advanced data-management systems as Salesforce
- Automated translation services



The Nature of Chat

Chats often take on a very non-linear quality with overlapping segments that are not always directly in response to the comments immediately above it. This can feel confusing and overwhelming to some clients. Try to be respectful of the needs of your chat clients and respond accordingly. If they seem overwhelmed by short segments coming at them in quick succession, you might want to slow the chat down, make one statement or ask one question and then wait for a response before chiming in with another thought or question.

It takes longer to type than to talk, and chat conversations in their entirety can often take much longer than the average phone conversation. Clients may also choose to do other things in addition to chatting with you, such as engage in other chat conversations with friends, play online games, surf the web, watch TV or engage in household tasks. This can be true even in a chat that relates to a potential crisis situation.

Depending on the software that your center uses, you can usually see when a client is typing in the chat window before they hit send (as they usually can with you), which may help you feel assured that your client is still there and is composing a chat segment. But again, because people tend to chat while simultaneously doing other things, long pauses between chat segments without seeing activity on the part of the client are not an automatic cause for worry. As with other type of I&R interactions, it is important for the Specialist to accept this reality and remain non-judgmental – don't let it upset and/or frustrate you.

There should be as little lag time as possible on the part of the chat specialist between chat segments (i.e. adequate typing speed is important). You don't want to give responses just to be fast (they may be of poor quality), but you do want to be able to type fast enough to convey your engagement.

Chat interactions also provide an easier way to seek support and guidance from I&R colleagues since the client cannot overhear your discussions. Some chat software even allows other chat specialists to observe the chat live as it unfolds, allowing for consultation and feedback from peers and supervisors.

Chat interactions can often end abruptly and you might not know or understand why. There are several reasons why this can happen. For example:

- The client's Internet connection dropped
- A friend/roommate walked in or some other event occurred and they needed to end the chat quickly
- Their cell phone connection dropped or battery died
- The client did not like how the specialist was responding

These suddenly ending chats can provoke anxiety for the chat specialist – in much the same way as when a phone contact is suddenly cut off.

Important Differences between Chat and Telephone Experiences

When engaging in chat, you lose the advantage of hearing the tone of voice and/or vocal inflections of a client. This is a barrier to both building empathy and sensing the client's feelings. It makes the use of clear, concise language even more critical and provides additional reasons to discourage the use of slang and humor.

You can't easily discern the personality or background of a client through the medium of chat. Although a younger demographic tends to prefer chat, people of all ages and experience levels are now also using chat. You can't make assumptions about a client's age based on the fact they are using chat.

A chat inquiry is broken up into what are called "Chat Segments". These are the individual portions of text that are typed into the chat window and "sent" by either the client or the I&R Specialist.

Individual chat segments tend to be briefer than spoken conversation (for the very good reason that we can't type as fast as we can talk), so we need to be mindful of how we interpret and manage interactions. For the client, these segments can come across as abrupt if they are too rapid-fire. On the other hand, typing long responses can make the client feel that you've disappeared while they are waiting to hear from you.

Generally, it is better to send messages sentence-by-sentence or in short sentence groups so that the client knows you are still there and interacting. However, this may be an issue for a chat specialist who is a very fast typist. There is no one style that will work for every situation. The progress of the chat and the client's familiarity with the medium should also help guide the interaction.

I&R Chat 101

General Guidelines

I&R chat is still a developing practice as different programs are implementing a variety of policies to guide their staff. The essence of good I&R remains the same as outlined in the I&R process. However, the following are some general suggestions to consider when conducting chat:

- **Maintain professionalism.** Interactions should always be professional, yet friendly, safe and welcoming. Always imagine that your words will be reviewed.
- **Don't use abbreviations.** Just because you know what something means, does not mean you can assume that all clients will know.

- **Keep spelling errors to a minimum.** Some chat software will allow you to conduct a spellcheck before you send something to the client. If your software does not do that, still give your entry a quick scan before sending. Some typos will inevitably occur but if there are a string of mistakes, a client may question your professionalism and therefore, the information you are providing.
- **Do not use emoticons or chat lingo.**
- **Do not type in ALL CAPITALS.** It looks like shouting.
- **No joking.** It's too easy for intentions to get mixed up in the absence of non-visual, non-verbal cues.

The Chat Process

The chat process to all intents and purposes is identical to the conventional I&R process. If you follow the tenets of good I&R in your chat interactions, you will be in equally well-positioned for a successful I&R chat.

Here are some general guidelines for the chat process:

Greet the client. Create a good first impression, show interest and establish a connection with the client.

"Welcome to 2-1-1 Chat, my name is _____. How may I help you?"

Listen to the problem/issue presented by the client. Active listening skills such as paraphrasing and reflection of feelings are still critical to good chat contact. As you cannot hear the client's tone of voice, clarification is important to ensure a good understanding of the situation. However, be alert for the easy pitfall of simply peppering the person with questions.

Ask one question at a time or the client is likely to miss that you were asking multiple things and move on after answering the first one. They may also start to feel overwhelmed and pressured. Offer statements in between questions that demonstrate empathy with the problem that the chat client is facing.

Assess needs and gather relevant information. Follow general I&R procedures for a good needs assessment. Gather any additional demographic data that you are normally required to collect by your agency/program. It might also be good to find out if the client is alone, and can chat candidly. If someone else is around, it could result in an abrupt disconnect.

Locate referrals. During the referral process, the chat specialist might have a unique opportunity to assist the client with the navigation of your program's online database. Some clients will have chosen the chat option on your website following an unsuccessful search of your online database. In addition to providing the information that will help the client, you can also explain how they might find it using the online database.

When searching in response to an inquiry, it can be helpful to use statements such as, "One moment while I research some programs that might be able to help," etc., as you would if you were on the phone and wanted to let the person know there would be a pause in your interaction.

When you provide referrals via chat, one of the simplest ways of conveying the information quickly and accurately is to copy and paste referral data from your database into the chat window. Do not copy and paste entire agency/program profiles into the chat window all at once. Only copy and paste the information from the relevant elements of the database listing using explanatory phrases as you would on the phone. For example: “Their office hours are....” (paste hours); “They ask that you bring the following identification....” (paste list of ID required).

Develop an action plan. Just like on the phone, it is important to help the client work towards creating their own action plan that includes contacting referrals and possible coping strategies, and reviews their ability to move forward with those referrals while addressing any potential barriers to their plan.

Close by confirming that you have met the client’s needs. Ask them if there is anything else you can help them with day. When ending the chat, remind them they can contact you at the hours in which you are open.

Document the chat. While most chat software will maintain a chat history and the ability for a supervisor to run reports on the total numbers of chats and some other types of data, it is also important to document your chat in your I&R software in the usual way so that the client’s problem/needs and the referrals you offered (or any unmet needs) can be tracked for reporting purposes.

Possible Chat Dilemmas

As mentioned above, transitioning to chat isn’t as simple as typing instead of talking. The following list will describe problems organizations can expect to face after they adopt chat, and how to handle them.

Handling multiple chats.

Multiple chats are not as difficult to handle as many people think. Each I&R service will need to determine how many chats they will allow one chat specialist to handle. Your agency’s decision should factor in the capabilities of your chat specialists in terms of typing speed and ability to multi-task as well as whether your chat specialists are also simultaneously answering phone calls. The general guideline is that if a chat specialist accepts any chat (even just one), they should no longer be available to accept a phone call until they have completed their chat. It is possible to process two or more chats at the same time, but not possible to give proper attention to both a chat and a call simultaneously.

For someone used to Instant Messaging, taking multiple chats should be quite similar to the experience of messaging with multiple friends. Specialists not accustomed to IM programs may feel comfortable only taking one chat at a time, until they get used to the medium. This is generally acceptable, as the prime focus should always be on the quality of service.

Handling crisis and emergency situations via chat.

I&R services often come into contact with people in crisis who are also seeking information about community resources. Crisis intervention skills work via chat in the same way as on the phone. Please refer to the relevant section in this manual to recall those skills. If the situation crosses the line from crisis to emergency (that is, a medical emergency, suicide attempt in progress, or a risk of

imminent danger to self or others), chat specialists must use all of their abilities to get a client to share identifying information in order to dispatch emergency services. Most chat software provides the IP address for a chat client, and some self-reported information may also be available if your service uses a pre-chat survey, but this information is rarely enough to allow for emergency response without the client's consent.

Prank contacts/sex gratification contacts.

If clients are inappropriate, notify your supervisor and disengage from the chat following your normal program guidelines for those types of contacts.

Linking to Internet resources

Be wary of clicking on a link suggested to you by a client. Do not visit that website, no matter how harmless its URL name seems – this includes links to videos, blogs, or social networking profiles. While it may be something totally harmless, you have no way of knowing if this is a link to a virus, pornography, or any other number of things that could endanger your organization's computer network.

As chat specialists however, you can direct clients to websites that you know are secure and have been approved by your resource specialists.

The supervision of chat

As with telephone-based I&R service delivery, supervision of chat specialists is required for quality assurance purposes and to help staff develop their skills. The medium of chat lends itself well to supervision since there is usually a transcript of the entire transaction between the I&R Specialist and the client. Here are some ways that a chat specialist can receive feedback and coaching.

Self-evaluation

The chat specialist can access transcripts of their chats to review on their own time. After the chat is over, the chat specialist can benefit from reviewing their conversation with the client and can often clearly see what worked and what did not work in interacting effectively.

Monitoring of chats in real-time

In most chat software, a supervisor can monitor and/or coach the chat specialist from within the software as the chat is taking place. This is similar to the ability of I&R services to have a supervisor listen to a live call and provide immediate feedback or complete a call monitoring form according to agency protocols. Real-time monitoring is especially helpful when a specialist is new to chat, and can benefit from in-the-moment coaching.

Supervisor review of chat transcripts

A supervisor can and should also review transcripts of chats that have already taken place and are stored within the chat software. Supervisors often report enjoying working with chat transcripts as

a feedback tool because it provides such a clear view of the chat specialist's skills and gives the supervisor very direct examples to reference in coaching.

Post-chat feedback survey

Most chat software also allows the administrator to set up a post-chat survey, asking the client for feedback after their chat session has ended. This feedback can also be used as part of the supervision process. Many chat specialists report finding it very helpful and encouraging to be able to read the reflections of clients to their experience with the chat service.

Example: Common Scenario

A client using the name “Anon” enters the chat.

Following the greeting by the chat specialist, “Anon” asks for assistance with a rental deposit. After being asked for additional information, the client reveals that she and her family (husband and two kids) have been living with her parents for the past three years and are desperately trying to find their own place. They have the money to pay the monthly rent, but don't have enough saved to pay a security deposit.

The specialist expresses empathy for their frustration and asks what resources the client has already tried. It turns out that the client has already tried the first three referrals that the specialist was planning to suggest.

The specialist asks about any special circumstances in their home and the client reveals that both her children have special needs. The specialist is able to offer a referral that provides support and assistance with rent and utilities for families with special needs children.

The specialist then explores some alternative options, such as asking for help from their church.

The specialist encourages the client to use the service again in the future and asks for consent for a follow-up call to see if they were able to find the services that would help them.

Questions to consider:

1. In what ways was this scenario the same or different from a phone call?
2. What skills would be needed to handle this scenario via the written word?
3. What are some of the considerations involved in engaging a chat inquirer for follow-up services?

Suggested ways to chat with clients

- “Welcome to Ourtown I&R’s Chat. My name is _____. How may I help you today?”
- “It sounds like you are pretty frustrated with your previous efforts to resolve this issue.”
- “It sounds like you have lots of concerns right now. I want to make sure I understood what you are asking for, can you clarify that you are looking for emergency housing tonight?”

- “I can search for some referrals that can help you. I just need to check our database to find some options. I will be back to our chat in a minute.”
- “You mentioned you had trouble finding these food pantries when searching on our website. If you ever come back and want to try searching again, you can click on the food icon on the resources page. Be sure to put in your ZIP code when asked so that you will get the results for services that are closest to you.”
- “Are you still there [Client's Name]? I am happy to wait a few minutes for you to return and complete our chat, but if I don't hear from you soon, I may have to disconnect so that I can serve other clients.”
- “Thank you for contacting us today. If you ever need assistance in the future, please feel free to contact us again via chat or by calling us on 555-3333.”

Sample Privacy Agreement

2-1-1 TAMPA BAY CARES CHAT PRIVACY DISCLAIMER

The 2-1-1 Tampa Bay Cares Chat Service is intended to provide information about and referrals to local Health and Human Services in Pinellas, Hernando, Citrus, Lake and Sumter Counties in Florida.

If you or someone you know is going through a mental health crisis or is feeling suicidal, please dial 1-800-273-TALK (8255) for the National Suicide Line. This is a nationwide number and their services are available 24 hours a day.

Providing Your Information:

During your chat session, you will be asked to provide us some demographic information such as email address, zip code and age. 2-1-1 Tampa Bay Cares, Inc. is committed to your privacy and agrees to keep your information confidential. If you choose to share additional personal information with us, it will be used for internal purposes allowing us to better serve you. We never sell, rent or exchange any of our clients' information. Any information provided by you will be disclosed in accordance with applicable local, State and Federal Laws and regulations. A transcript of your chat session between you and our Information and Referral Specialist is recorded and stored for quality assurance and training purposes. You will be asked to provide your email address so that a copy of the chat session can be emailed to you for your records.

Automatically Collected Statistics:

When you visit to our website, we automatically gather information about your visit. This general information identifies you as a unique visitor to our web services and does not provide us any other personal information about you. This information allows us to report on the traffic on our webpage so we can understand the impact of our work and improve your future online experience with us. This information is viewed and reported aggregately.

Chat Session Agreement:

With any online service, there is some level of risk when communicating over the Internet. By reading and agreeing with this Privacy Disclaimer and engaging in one of our Chat Sessions, you give permission to 2-1-1 Tampa Bay Cares to provide you some assistance today and expressly consent to the collection of your demographic information and statistics for future reporting purposes and expressly consent to the recording of your chat session. Furthermore, you understand that 2-1-1 Tampa Bay Cares will undertake all efforts to protect your information, but it is not responsible for any information you may enter during the chat session.

How to Begin: 5 Steps to I&R Chat Implementation

The following are a list of initial tasks that must be completed to implement the new I&R program:

Step 1: Review technology options. Search for “live chat software” on the Internet and review the results. Consider whether you want a solution that operates within your phone system or outside of it. Consider solutions with features that are useful for chat, such as canned responses and pre-chat surveys.

Step 2: Provide the necessary training . Are your current I&R Specialists capable of adapting to chat? Review the “Staff Skill Sets” section of the document and see how your staff matches up. Younger specialists tend to be more accustomed to digital communications such as social media. If your current staff may not be a good fit for non-verbal I&R, training or new hires should be included in the budget.

Step 3: Plan your budget. I&R Chat budgets typically contain the following items: costs of software licensing; technology hardware procurement, such as new computers if necessary; training; program development; software subscription fees; and personnel, if anyone new is brought on.

Step 4: Create a funding strategy. Once the expenses have been forecasted, it will be time to identify ways to raise the funds if necessary. Although chat and text does incur additional expenses, it may open up new funding opportunities. Additionally, foundations that promote innovation and favor technology-related programs may grant money to text and chat initiatives. Further, many centers that have adopted chat report an increase in money from contracts.

Step 5: Present to the Board. The Board of Directors should be informed of how technological and cultural changes are affecting the way people communicate, and why it is urgent that I&R adapts to this change. Make sure you do your homework, especially in regards to budgeting and sustainability.