

Navigating Complex Systems Video Transcripts

Navigating Complex Systems Intro

Welcome to the Navigating Complex Systems training! The Allegheny County Department of Human Services is committed to improving access for Allegheny County residents to connect to available resources and services, and you play an important role by being the bridge to get people to the resources that they need.

This is challenging work. People in need might be confused about where to turn, frustrated by past experiences seeking help, or overwhelmed by how to navigate the different systems where they are looking for resources.

The goal of this training is to give you practical tips as you help individuals to navigate these complex systems and get them to the help that they need.

By the end of this training, you will:

- Recognize your role in helping individuals get to the services and resources that they need
- Understand the guiding principles for resource navigation and get experience putting those principles into practice
- Be knowledgeable about the roles of DHS program offices and understand their entry points
- Demonstrate skills, including:
 - Active listening
 - Screening for an individual's needs
 - Assessing an individual's capacity for resource follow up or self-referral
 - Seeking additional information and following up with an individual when you don't know the answer
 - Obtaining additional information from an individual by asking follow-up questions
 - Working with and de-escalating frustrated or challenging individuals

You will also learn about what to do next if everything that you have tried with an individual has not worked.

Scroll to the bottom of the page and click on the Pre-Survey to begin the course. Good luck!

Lesson 1: Key Principles

There are six guiding principles that are going to be the basis for the information that is presented in today's training. These principles are based on DHS's mission, as well as the core values of social work and the person-centered counseling approach.

Principle number one is that resource navigators recognize that every person is dealing with a unique situation, and has individualized needs, goals, strengths, and personal histories. Resource navigators also acknowledge the impacts that systemic racism and other forms of marginalization may have on a person's individual experience.

Number two: Resource navigators will assess the needs of each individual and offer connection to a full continuum of available services based on those needs.

Number three: Resource navigators withhold judgement and promote self-determination by trusting individuals to make their own choices and determine their own futures; resource navigators also acknowledge that at times, people ask for and need a higher-level of hands-on assistance.

Number four: Resource navigators commit to being persistent, creative, and proactive in the search for resources.

Number five: Resource navigators appropriately use their role as professionals to advocate for individuals to obtain available resources, resolve bureaucratic barriers or conflicts, and collaborate with other helpers.

Number six: Resource navigators seek to be as transparent as possible with individuals about the availability of resources and set appropriate expectations regarding the process and timeline for obtaining resources and services.

Ok, let's try out some examples of identifying the guiding principles in action.

Lesson 2: Key Skills Intro

The guiding principles will help to steer your work, but how do you actually put them into practice?

This section of the training will review some of the key skills needed for resource navigation. As a professional who works directly with individuals, you probably already have a wide range of skills and techniques that you use every day. So, if you are already familiar with these skills – that's great! This training can serve as a refresher for you. If some of the skills are new to you, you might want to talk with your supervisor afterwards about any areas where you would like additional training.

It is also important to know that each of the skills that will be reviewed might look different depending on whether you interact with the people you serve face-to-face, by phone, or in writing.

Topic 2-1: Active Listening

What does this look like practice? When you're listening to understand, you're showing the person who is speaking that you're paying attention, through your eye contact and body language.

You're allowing the person who is speaking plenty of space to complete their thoughts without cutting them off or jumping to conclusions.

Active listening also involves asking clarifying questions and reflecting back what you've heard to make sure that you fully understand. Here is an example of how that might sound: "What I think I've been hearing you say is that you've been taking steps to find employment but that you're worried about being able to afford childcare for your two daughters. It sounds like maintaining reliable transportation is also an issue for you. Is that right?"

Giving your full attention to the person speaking instead of focusing on what you're going to say next will help to establish better rapport with the person who you are assisting and help to prevent miscommunication.

Topic 2-2 Screening an Individual's Needs and Asking Follow-Up Questions

To help individuals connect to the resources they need, you must first understand the situations that they are in and the goals that they have. A person may present to you by saying that they need help with something broad such as "housing," which requires that you get more information to understand the specific issues that they are facing and what they hope to see happen. On the other hand, an individual may tell you a long story where they recount multiple issues, and you need to ask questions to clarify and prioritize their needs.

You may have specific intake or assessment tools that you use in your role. If you do, you will have received training about how to use those tools. If you do not use a specific needs assessment, it can be helpful to start by getting information about different areas of need. You might say, "I'm going to ask you some questions so that I can get a better understanding of your situation and how I might be able to help."

The amount that you ask will be based on your role and the level of involvement that you have with the individual, but areas to ask about may include:

- Crisis needs, such as imminent eviction, homelessness, domestic violence, and mental health
- Basic needs, such as food, clothing, transportation, baby essentials, childcare, and aging supports
- Education and employment
- Family composition
- Housing, including rent, utilities, and landlord relationship

- Financial well-being, including benefits, credit, and financial literacy
- Physical and mental health, health insurance, and substance use
- Veteran status
- Legal issues and criminal history
- The individual's strengths, including hopes, social bonds, cultural and spiritual resources

As you're talking with an individual and trying to understand their needs, you may need to use thoughtful questions to gather additional information and get as clear a picture as possible about their situation.

Active listening is key to guiding strong follow up questions. For example, if you've been talking to someone who is stressed about rent you might ask, "it sounds like you're having trouble paying your rent, how are you doing with utilities and food?"

A good way to better understand the individual is by using open-ended questions, instead of closed-ended questions.

As an example, instead of asking "Do you need diapers?" you could say, "You said that you have a new baby. Can you tell me about any needs you have related to caring for your baby?"

Or instead of asking "Do you have enough money to get by?" you could ask, "Can you tell me about your financial situation?"

Closed-ended questions can be important to get specific information, but open-ended questions can be a good way to invite individuals to share information that is important to their situation.

Topic 2-3: Understanding Capacity for Resource Follow-Up

Just as each person has unique needs, each person has a different level of capacity to follow through on the resources or referrals that you provide to them. In addition to assessing someone's need, you also need to understand that person's capacity for follow up. It is important to have a thorough understanding of their situation and what resources are available to them, but those resources won't be helpful if the individual is unable to do the follow up necessary to utilize them.

When you are actively listening, you will likely get a sense of the individual's ability to follow up on resource referrals. For example, when an individual has multiple serious issues going on and sounds overwhelmed, or seems to have challenges processing the conversation, these might be situations requiring assistance with resource follow up. The best way to know, is to ask the individual.

Here is an example of something you might say:

“The next steps that we discussed are calling your electric company about your overdue bill and submitting an application with the Blessing Board for furniture. You said that you’re able to call your electric company today when we get off the phone. For the Blessing Board, you need to fill out an online application for an appointment. Would you like me to fill out the application with you right now over the phone?”

When you have this conversation, be clear about the next steps and who is doing which part.

If you are working with an individual who may need longer-term supports, but you only work with people on a short-term basis, connect the individual to longer-term supports. You may need to reach out to a program office to understand what longer-term supports are available.

Topic 2-4: De-Escalation

Many of the people that you work with will be in situations of severe stress and may be frustrated, overwhelmed, or angry – particularly if they have not been able to find the help that they need. They may also have experiences where systems that were supposed to help them did not, or even caused harm.

You can help to de-escalate situations by non-judgmentally acknowledging the individual’s emotions, using active listening to understand the root of the individual’s frustration, and being clear about what you are able to do to address it.

Instead of telling the person what to do by saying something like “lower your voice,” acknowledge the emotion that they are expressing and say something like – “I can hear that you’re upset.”

Avoid trying to overidentify with the individual by saying “I know how you feel,” or bad-mouthing other professionals by saying something like “that agency always screws things up.”

Instead, you might say “I’m really sorry that you’re going through this,” and calmly ask questions to understand the needs that are underlying their frustration.

It can be hard to maintain your calm when someone is upset or escalated, and there are longer trainings devoted to de-escalation skills. Talk to your supervisor if you would like to complete additional training on this topic.

Lesson 3: Working with DHS Program Offices

As you are assessing an individual's needs, there will be circumstances where you are not familiar with the resource that the individual is requesting, or you are not sure how to proceed. Great resource navigators do not need to know everything, they just need to be willing to look for what they don't know.

In these situations, you should let the individual know that you want to be able to provide the best resources you can, and that you need to do additional research and be back in touch with them. It is important not to make promises about what you will be able to find for them and to be clear about when and how you will reach back out.

How you look for information that you don't have will depend on the situation and your role. It might involve contacting a DHS colleague in another program office or going to your supervisor.

You are probably familiar with the DHS program offices, and you may already work closely with staff from other offices, but we will provide a short refresher on each office and how you can work with them.

Topic 3-1: Area Agency on Aging (AAA)

The Area Agency on Aging (AAA) is responsible for providing coordinated, participant-centered services to Allegheny County residents, primarily those 60 years of age and older, to help them remain as independent as possible. AAA offers a range of resources for older adults, caregivers, and the general public. These services address a continuum of care that begins with services for individuals who are active and independent to services for individuals who are frail and vulnerable. The AAA also runs the SeniorLine, which is the authoritative resource for information about and access to services provided by the AAA and its community-based providers. The SeniorLine can be reached on weekdays between 8:30 AM and 4:30 PM at 412-350-5460.

If you have a question related to resources for adults ages 60 and over or their caregivers, AAA is a good place to start.

Topic 3-2: Office of Behavioral Health (OBH)

The Office of Behavioral Health (OBH) is responsible for providing Allegheny County residents with mental health and substance use services. OBH directly contracts for and monitors approximately 96 community-based agencies which provide an array of services designed to meet the mental health and substance use services needs of adults, children, and adolescents. This includes a wide range of services, from outpatient treatment to residential services, Justice Related Services for individuals involved in the criminal legal system, school-based services, and much more. OBH also runs the Medical Assistance Transportation Program (MATP), which provides transportation to medical appointments for Medical Assistance recipients who do not have transportation available to them.

OBH is the best place to contact for questions related to accessing mental health and substance use services and supports, as well as Medical Assistance Transportation.

Topic 3-3: Office of Children, Youth, and Families (CYF)

The Office of Children, Youth, and Families (CYF) works to protect children from abuse and neglect; to preserve families, whenever possible; and to assure permanency, that is, to provide permanent, safe homes for children either by assuring safety within the child's own family, or by finding an adoptive home or another permanent setting for those children who cannot be reunified with their family.

You will likely need to work with CYF when you are coordinating resources for a family that is CYF-involved.

If you need to report suspected abuse you should directly contact Childline at 1-800-932-0313.

Topic 3-4: Office of Community Supports (OCS)

The Office of Community Services (OCS) provides a wide range of services and supports to empower people, strengthen families, and work to build a healthy, connected community. The programming in OCS includes homeless services, housing navigation, early childhood supports, childcare, out of school time programming, transition age youth services, self-sufficiency programs, community and court-based resource navigation, and more.

You should contact OCS if you have questions related to resources for new parents, early childhood, school-age children, transition age youth, homeless services, and economic self-sufficiency programs.

Topic 3-5: Office of Developmental Supports (ODS)

The Office of Developmental Supports (ODS) is responsible for registering eligible residents with: Intellectual Disability, Autism, Developmental Disability prior to age 9, and Medically Complex Conditions prior to age 22.

They also serve as the county's Administrative Entity for waiver funded Home and Community Based Services for these eligible individuals.

Contact ODS when you have questions about information and resources related to intellectual disability, autism, developmental disability, and medically complex conditions.

Topic 3-6: Connecting to Program Offices

In addition to the program offices, you may also need to reach out to support offices that have expertise in specific subject areas, such as the Justice Collaborations Team in ATP for criminal justice related questions, or to OEE for assistance related to language access or resources related to immigrants and internationals.

There are a few ways that you can reach out to staff in other DHS offices for help with accessing resources.

First, DHS keeps a list of contacts for each program office who can be contacted if you have resource questions. You can use these contacts if you need to collaborate with another office in working with an individual and aren't sure who to reach out to, or if you have resource questions related to another program area. The contact list will be sent to you after the training.

You can also send an email to the "DHS Resource Network" at dhsresourcenetwork@alleghenycounty.us. The DHS Resource Network is a group of 'resourceful' individuals representing every program office and support office at the Department of Human Services. You can email a question to the email list and members who have answers will reply to the whole group so that you can crowdsource resource information.

Don't hesitate to ask questions or reach out for support from others.

Lesson 4: ClientView

It is good practice to check ClientView to see if an individual who you are assisting is already involved with services or supports. With the individual's permission, you can help reconnect them to services or make sure that you're working in collaboration with other service providers.

If the person you are assisting is already connected to many workers and services, but is confused about what each person is doing or still isn't getting to the help that they need, you can assist by having a meeting or call that brings together all of the workers and the person being served. By getting everyone on the same page you can make sure that everyone is working together to support the individual's goals instead of duplicating work.

If you need to learn how to use ClientView, you will get information following this training about how to receive it.

Lesson 5: 2-1-1

Knowing where to turn within DHS and how to work with other service providers is an important part of resource navigation. But sometimes you will be helping individuals to connect to resources outside of DHS or the DHS provider network. If you aren't sure where to find a specific resource, 2-1-1 is a good place to look. 2-1-1 maintains a comprehensive directory of resources that you can search by location. This can be especially helpful to identify the resource closest to the individual you are assisting – like the food pantry nearest to Tarentum, or transportation assistance in McKees Rocks.

Anyone is able to call or text 2-1-1 24/7, but if someone has made it to you in their search for help, you can save them another call by searching the 2-1-1 website yourself.

When identifying resources in the community you also want to be mindful of whether the resources you identify are accessible and culturally relevant to the person you're working with. Questions about the individual's access to transportation, the language they speak, what accommodations they might need, and which areas of the county they feel comfortable in are all important in deciding which resources to provide.

With the right connections to other DHS staff and access to the 2-1-1 resource directory, you should be able to find the best available resources for the people you are working with.

Lesson 7: Wrap-Up

This brings us to the end of the Navigating Complex Systems training.

We've reviewed the guiding principles of resource navigation and skills to do this work effectively. You've also had a chance to practice how these principles and skills apply to real situations with individuals.

This training provides a brief overview of skills for resource navigation, so if there are skills that you want to develop further, talk to your supervisor about what additional training is available.

But even if you feel very comfortable with the skills and guiding principles from this training, there will always be really challenging situations where you aren't sure what to do.

When in doubt start by asking your supervisor for help, and if necessary, reach out to DHS staff in other program offices who might know about resources or have information that is outside of your area of expertise.

Human services systems aren't simple, and you won't be an expert on everything. But if you aren't afraid to reach out for assistance when you need it, you will have a network of helpers who you can call on.

Your work is incredibly important, and when you approach each individual with open-mindedness, care, and persistence – that makes a difference.