



*Setting the Standards for
Information and Referral Services*

Accreditation Application 2021

(September 2017 Criteria/Accreditation Manual)

**ALLIANCE OF INFORMATION
AND REFERRAL SYSTEMS, INC.**

National Headquarters

11240 Waples Mill Road, Suite 200 • Fairfax, Virginia 22030

(703) 218-AIRS (2477) • Fax (703) 359-7562

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Information & Referral
*connecting people to
community services*

AIRS ACCREDITATION OVERVIEW

The purpose of the Alliance of Information and Referral Systems (AIRS) Accreditation process is to determine the compliance of Information and Referral (I&R) programs with approved practices within the field of as defined by the [AIRS Standards for Professional Information and Referral](#).

Accreditation is a cooperative effort between the I&R agency and AIRS to establish a strong foundation on which the agency can build and grow. An agency considering accreditation for the first time, should assess where it is in its development, its goals and whether it is ready for accreditation. Agencies must meet minimum requirements outlined in the *2019 Accreditation Criteria* to become accredited.

General Advice

Before starting:

- Read the [AIRS Standards and Quality Indicators](#)!
- You can find general information as well as an accreditation readiness assessment and a resource database self-assessment on the Accreditation page of our website: www.airs.org/accreditation. The assessment documents are particularly useful as an indicator on whether you are ready to start the process.
- You do not have to be perfect to apply – you have time to make adjustments as the process unfolds.
- However, on the other hand, please do not apply if you are a new program – focus on getting your operation functioning smoothly while using the AIRS Standards as a guide.

For more general advice throughout the accreditation process, please see the General Advice Section in the 2019 Accreditation Manual.

Process Overview

Accreditation is a process that includes:

- a **Consultative Review** of your overall policies and procedures
- an online **Community Survey** of organizations within your resource database
- a **Resource Database Review** to ensure that the resource database meets minimum requirements
- a **Secret Shopper** testing of your direct service. This will be undertaken by a company called Spot Check and involves a series of 10 calls
- and an **On-Site Review** during which a review team witnesses the agency in operation and verifies that its practices are consistent with the accreditation criteria.

All transactions between AIRS (including members of the site visit team and Accreditation contractors) and the applicant agency, and all materials submitted by the agency, are confidential. The only information that AIRS shares with outside entities is whether a program is or is not AIRS Accredited. The process for re-accreditation is the same as outlined above.

Timeline Overview

The accreditation process must be completed within 12 months for existing holders of AIRS Accreditation. First time applicants have 18 months to complete the process.

Work on each of the first four elements should be done simultaneously. The first four elements should be completed within 6 months of receipt of the Application packet for existing holders of AIRS Accreditation. First time applicants have 8 months to complete the first four elements.

By the end of the 10th month for existing holders of AIRS accreditation, all outstanding materials, documentation and resource database work must be completed. First time applicants have until the end of the 16th month. Existing holders of AIRS Accreditation have a total of 3 months for all submissions of corrections. First-time applicants have a total of 8 months for all submissions of corrections. AIRS strongly recommends that the 4 components before the onsite review should be commenced as soon as possible.

The onsite review should be completed by the end of the 11th month for existing holders of AIRS accreditation. First time applicants have until the end of the 16th month to complete the onsite review. Accreditation determination is made by the end of the 12th month for existing holders of AIRS accreditation. First time applicant's accreditation determination will be made by the end of the 18th month.

If you are seeking re-accreditation, then your application and payment should be submitted at least 6 months before your current expiry date. The implementation of this will be staggered for agencies due to re-accredit over the coming year. Please contact Amy Fish at amy@airs.org to check on your particular situation.

If you apply late, you lose time from your process. For example, if you apply 2 months late, you only have 10 months to complete the process instead of 12 months.

The first 4 components of the AIRS Accreditation process must be completed before an Onsite Review is scheduled. You can start any of the four components at any time before the specified deadlines and there is no specific order that they need to be completed in. **IMPORTANT: AIRS strongly recommends that the first 4 components should be commenced as soon as possible.** You do not need to await the completion of one component before starting another. This is particularly true with scheduling your database review to allow more time for corrections.

Please see the timetables in the 2019 Accreditation Manual for further details.

Accreditation Outcome & Responsibilities

Accreditation awards are made for a period of five years. Agencies will be up for renewal in the same month every 5 years. For agencies that are reaccrediting, the renewal date for the award will be exactly 5 years from the agencies last expiration date. For example, if an agency expires in February 2025 but doesn't (for whatever reason) complete the process until June 2025, their next accreditation would be valid through February 2030.

Following an accreditation award, the agency is required to:

- Respond to an annual update questionnaire reporting on the status of the organization and its activities.
- Notify AIRS of any changes that may negatively affect continued compliance with the Accreditation Criteria.

Failure to submit the annual update questionnaire following three reminder emails and a phone call will result in an asterisk being appended to your organization's name on the list of Accredited agencies on the AIRS website. If the agency continues to be out of compliance in the following year, accreditation will be revoked.

IMPORTANT: Eighteen months prior to expiration, agencies will be reminded to apply in one year. Agencies are required to apply six months prior to their accreditation expiration.

Causes for Termination/Revocation

To ensure the integrity of the Accreditation process, there may be situations in which termination of the process or revocation of the award is necessary.

Termination of the Accreditation process will occur if:

- An applicant agency does not comply with deadlines (see timeline above).
- An applicant agency is no longer able to comply with the Accreditation Criteria.

Accredited agencies who have not completed the re-accreditation process will be removed from the list of accredited agencies on the AIRS website upon their expiry date. The exception are accredited agencies that have started the re-accrediting process and are a few months away from completion.

Revocation of Accreditation will occur if:

- AIRS is notified and verifies, using multiple methods (other community agencies, newspapers) that an illegal act impacting on the integrity of its service has been committed by an agency which was awarded AIRS Accreditation.
- The organization does not apply for renewal of their accreditation by the expiration date.
- The agency does not submit an Annual Report (agency questionnaire) for two consecutive years.
- The agency does not complete the renewal process in a timely manner (see timeline above).
- An applicant agency is unable to comply with the Accreditation Criteria during the renewal.

I&R Systems Applying for Accreditation

In some states and provinces, organizations are cooperating formally within an *I&R System* sharing certain delivery components. Organizations may consider applying for Accreditation *as a system* if they meet the following criteria:

1. There is an agency that can demonstrate that some core elements of the accreditation criteria (such as resource database, training, and reporting) are being implemented centrally for the system as a whole. The answers would be identical for any of the major components. In this case, the other accreditation applicants in the system do not have to individually demonstrate that they meet the requirements of these core or common components.
2. The agency with the core elements must be accredited first. If successful, other agencies can apply for their own accreditation and have the benefit of the prior approval for those common components *within a three-year window*. Reaccreditation must follow the same pattern.
3. Before an I&R System may begin the application process, AIRS must receive an Agreement/MOU signed by all parties in the system that describes the structure of the system (i.e. the roles, responsibilities and governance within the network).

Please note: Collaborations unified under a public banner (such as 211 Greenstate) that have varying components across multiple organizations (e.g., training, reporting or a statewide database that is maintained by multiple agencies in the system) *cannot apply for accreditation as a system*. The organizations in this configuration must apply for accreditation individually. There may also be occasions where an accrediting agency has sub-contracted an element of the work to a non-accredited agency – in which case, all elements must be reviewed regardless of where it is housed.

For more information about the accreditation process, refer to [the Accreditation page on the AIRS website](#), or contact AIRS Accreditation Director, Amy Fish at amy@airs.org.

AIRS ACCREDITATION PROCESS DESCRIPTION

Consultative Review

1. For existing holders of AIRS Accreditation, you must have completed the following within 6 months (first time applicants must complete within 8 months):
 - a. Review the Accreditation Criteria and contact the AIRS Accreditation Director with questions as needed.
 - b. Complete and have the Board President or other Chief Officer and the Executive Director/I&R

Program Manager sign the “Certification of Accreditation Documentation” form (check table of contents) and submit this with your initial documentation.

- c. Submit an electronic copy of the consultation materials, including the Certification of Documentation Agreement form on the preformatted Google Drive as directed by AIRS staff. (Refer to the Guidelines for Electronic Submission of Accreditation Materials detailed in the accreditation manual).
- d. All materials must be current at the time of submission.

2. Within four weeks of receipt of submitted documentation, AIRS will:

- a. Analyze the submitted materials and write a consultation assessment report identifying where requirements have been met and where they have not been met.
- b. Send a copy of the consultation assessment report to the applying agency.
 - **NOTE:** Most agencies will need to submit additional documentation during the Consultation Component. Please allow for this contingency in your plans.
 - Please review the consultation assessment report and contact Amy Fish, AIRS Accreditation Director with any questions. You must respond to the consultation report and provide supporting documentation and evidence of implementation by the end of the 10th month for existing holders of AIRS accreditation. First time applicants have until the end of the 16th month to submit all needed materials. This includes all submissions of corrections for consultation reports.

General Approach:

A careful balance of narration (explanation), checklist responses, and documentation is needed to establish that you have satisfied a component. It is very important that you give full responses for every component.

Be sure to read the minimum expectations, requests for narrative descriptions and the list of required documentation carefully and provide exactly what is asked for. In most instances, one sentence narrative responses are not adequate. Make sure your descriptions are concise, informative and complete. This cannot be emphasized too strongly.

Keep in mind that clarity, conciseness and coherence are keys to a successful application!

Review:

We recommend that you have at least two people review your material before submitting it. The primary reviewer should be the program manager or responsible contact person. The second reviewer might be someone who is familiar with your I&R processes but not necessarily a manager. Check for thoroughness, clarity, coherence, and readability. Use spell-check. Here's to your successful efforts!

Community Survey

The Community Survey provides the applicant with a snapshot of the awareness and perceptions of human service agencies within your resource database towards the I&R service.

1. By the end of the 5th month of the process, AIRS will request a one-time Excel file of all the agencies listed in the resource database including organization name, city, state/province, Executive Director name, and Executive Director email. Please note that if your agency does not want to provide the agency emails to AIRS based on an internal privacy policy, then your agency can choose to send the emails to the agencies directly from your email. AIRS will provide the outgoing message and the link to the survey.
2. 500 random email addresses drawn from the Excel file will be entered into AIRS' SurveyMonkey account. Please note that if the agency has less than 500 agencies then the email count sent will be lower. The agency is not required to have a minimum amount of responses received back.
3. Community agencies will receive an email announcing that your organization is seeking national accreditation through AIRS. They are requested to assist you by providing a survey response within two weeks. Please review the list of the questions on page 64 of this document.
4. The results are downloaded and sent to the agency seeking accreditation without comment. *Note that the process is part of AIRS Accreditation but the survey results are not a factor.*
5. When the agency receives accreditation, a thank you email will be sent to those 500 email addresses announcing that you have secured AIRS Accreditation. Please note that this will be sent directly by AIRS unless your agency prefers to handle it internally.

Resource Database Review

In order to verify that your I&R resource database meets AIRS accreditation criteria, an AIRS database reviewer will interview your resource database manager and conduct a remote online review of your resource database. The following topics are covered during the Remote Database Review:

- Inclusion/Exclusion Criteria
- Data Elements
- Taxonomy
- Applying Style Guide Rules and Indexing
- Disaster Resources
- Searching the Database
- Maintaining the Database

Review steps

1. In order to prepare for the review, the following documents must be sent to the AIRS database reviewer:
 - Inclusion/Exclusion Policy
 - Style Guide
 - Customized list of Taxonomy terms
 - Database maintenance procedures
 - Description of service area (including counties, towns, or regions)
 - Report showing formal updates
 - List of agency names and their legal status type/agency type for comparison with inclusion/exclusion policy
 - Target Term Use Policy
2. The review will be conducted via GoToMeeting software that enables the reviewer to see the applicant's database online.
3. The length of the review varies, but on average is about four hours total, which will be divided into two separate GoToMeeting sessions.
4. The database reviewer prepares a report and sends it to AIRS.
5. For more information about the remote database review and what it will include, see the Remote Database Review section of this document.
6. You need to respond to the database review report and provide details of your corrective actions. You also need to attach additional documentation if requested. This is due by the end of the 10th month for existing holders of AIRS accreditation. First time applicants have until the end of the 16th month to submit all needed materials. This includes all submissions of corrections for database review reports.

Secret Shopper

By the end of the 3rd month, AIRS will begin a series of third-party "Secret Shopper" calls. This process will assess your staff's call handling.

1. AIRS contractor "Spot Check" will conduct 10 calls during a variety of your open times.
2. A standard score card will be used to rate each encounter. The "pass score" will be an average of 80% for all calls scored. There is a copy of the score card in this manual (see table of contents).
3. Results will be shared with the applicant within one month via an online report.
4. AIRS will consult with applicant before the next series of calls if the average score is lower than 80%.

5. I&R programs that were part of United Way Worldwide's contract with Spot Check may be exempt from this component if their I&R service:
 - has been scored by Spot Check within the past 12 months;
 - the applicant emails Spot Check requesting their summary scores for the past year; and
 - AIRS receives a copy of the report.
 - AIRS will review the results and either approve report or begin Secret Shopper process.

Onsite Review

1. Following the final consultation report, the applicant and AIRS will schedule the onsite review.
2. All expenses related to travel (air, hotel, meals, etc.) are included in the application fee.
3. AIRS will work with the agency to schedule the review and identify the volunteer(s) reviewers. If there were any outstanding documentation issues, updated materials will need to be made ready.
4. AIRS volunteer(s) will conduct the onsite review. At a minimum, the site visit includes:
 - ✓ A tour of the facility
 - ✓ A meeting with the agency's volunteer leadership
 - ✓ Interviews with key I&R staff
 - ✓ Examination of documents per AIRS' request
 - ✓ Listening to calls
5. At the end of the visit, the review team will debrief with the administrative team as selected by the Executive Director. Board members may be included.
6. Please note that accreditation is not approved onsite.
7. The review team will complete the onsite assessment report and send it to AIRS.
8. AIRS will send a copy of the onsite assessment report to the Accreditation Commission chair, who will review the report and finalize the accreditation decision.
9. AIRS will send you an email indicating the outcome of the accreditation process:
 - a. Granting full accreditation for five years;
 - b. Granting conditional accreditation when an organization is in substantial compliance, but needs to take further action to comply with some criteria;
 - c. Denying accreditation.
10. AIRS may identify certain documents from your submission as 'best practices' and will request that they be shared, with attribution, with other AIRS members on the AIRS Networker.

AIRS ACCREDITATION APPLICATION

Please complete the following and email the entire document to AIRS Accreditation Director, Amy Fish at amy@airs.org. Please apply 3 business days before your deadline to allow for processing if possible. Please email Amy if you have any questions.

The cost is **\$6,000 USD** for AIRS members and **\$9,000 USD** for non-members, which includes all the costs of a site visit. Payment is made when the application is submitted. An applicant may choose to break this into two separate payments of **\$3,100 USD** each for members and **\$4,600 USD** each for non-members. All payments are non-refundable.

Accreditation fees paid by check can be mailed to: AIRS National Headquarters 11240 Waples Mill Road, Suite 200, Fairfax, VA 22030

To pay by credit card we can send you an invoice with a link to pay online. Please let us know if you need an invoice sent to your agency.

Please send to: AIRS National Headquarters
11240 Waples Mill Road, Suite 200
Fairfax, VA 22030
or email or fax it to Moayad Zahraiddin, Membership Director at AIRS.
P: 703-218-2477 * 4
F: 703-359-7562
moayad@airs.org

Date of application:

Amount being remitted to AIRS office separately:

Are you a **new applicant** or applying for **re-accreditation**?

Organization name:

Program name:

Mailing address:

Website:

Primary contact for accreditation process:

Title of primary contact:

Email address of primary contact:

Gmail address of primary contact (This will be used to access your Google Drive folders. You also have the option to send us a non-Gmail email that is connected to a Google account). You can also include Gmail of secondary contact or other staff if you want it sent to multiple people:

Secondary contact for accreditation process (optional):

Title of secondary contact (optional):

Email address of secondary contact (optional):

Geographic area served (city, county, province/state, multi-county region, nation):

Population in area served:

What **type of I&R** do you identify yourself as (e.g. 211, Aging-Disabilities, Blended crisis/I&R, etc)?

Software used for resource database and client interactions:

Number of **organization records** in resource database:

Is your **database maintained** by your agency or another agency?

Number of **mediated I&R transactions** handled in the last full Jan-Dec year (This is the total number of inquiries/contacts for the year. You can add all of the different types of contacts such as email, text, calls, etc.):

Parent Organization: If you are part of a larger organization, e.g., United Way, Area Agency on Aging, Community Council, etc., provide an explanation of your relationship to that organization, e.g., employees of, funded by, provides governance, etc.

I&R Services: Which I&R service are you accrediting? (For example, if your organization operates a 2-1-1 and an ADRC and a ReEntry program -- then you should just elect to have one of those programs accredited (e.g. 2-1-1 or ADRC). Each separate program accreditation is a different fee/process. Organizations tend to accredit only one specific program).

Date **organization established:**

Date **program established:**

AIRS **membership number**, if applicable:

Legal status of organization:

Hours of operation for primary I&R programs which are being accredited:

If not 24/7, how are **after-hours inquiries** handed?

How many **staff are in your I&R program** and how are they divided in terms of full-time staff, part-time staff and volunteers? What is the number in terms of full-time equivalents?

Do you have a **Board of Directors and/or a program advisory committee**? If both, which is the one that is providing primary oversight to the I&R program? How many members and how often do they meet?

In terms of **operational budget** for the I&R program (and for some applicants, this may mean the operational budget for the entire organization), what is the expenses budget for the last complete year?

What was the date of the last **organizational audit**, if applicable?

Community Partnerships and/or Projects: Describe the community partnerships and/or projects in which the I&R program is engaged (include the names of the organizations involved, the purpose and the type of project/partnership)?

AIRS ACCREDITATION CONSULTATION AGREEMENT

PLEASE REVIEW AND ELECTRONICALLY AFFIRM AGREEMENT

The Alliance of Information and Referral Systems (AIRS) Accreditation is a multi-phase process:

- (1) Consultative Review, (2) Community Survey, (3) Resource Database Review (4) Secret Shopper and (5) On-Site Review. For the consultation phase, AIRS provides the following: consultation materials, Accreditation Director to answer any questions, and a consultation assessment report. **All transactions between AIRS (including members of the review team) and the applicant agency, and all materials submitted by the agency, are confidential.**
- (2) The cost is **\$6,000 USD** for AIRS members and **\$9,000 USD** for non-members, which includes all the costs of a site visit. Payment is made when the application is submitted. An applicant may choose to break this into two separate payments of **\$3,100 USD** each for members and **\$4,600 USD** each for non-members (half at the time the application is submitted and the remainder prior to or at the time of the site visit). All payments are non-refundable.

In submitting the application to the Alliance of Information and Referral Systems, Inc. (AIRS), the applying agency hereby agrees to the following conditions:

1. The agency has been in operation at least one year.
2. The agency agrees to prepare and provide all requested documentation.
3. The agency agrees to notify the AIRS Accreditation Director of any changes in its program that may affect the accreditation of the agency.
4. The agency agrees that AIRS, its officers, or other persons involved in the consultation phase shall not be held liable for any applicant's failure to achieve accreditation.
5. The agency agrees that it has in place a statement approved by the organization's governing body prohibiting discrimination in all forms and documenting its intention to comply with all laws, orders and regulations addressing this issue and has a process for registering and resolving discrimination complaints from inquirers, staff members and the community.
6. The agency understands that participation in the AIRS Accreditation process is not a guarantee of accreditation.

AGENCY/PROGRAM NAME:

BOARD PRESIDENT/ADVISORY COUNCIL NAME AND DATE:

EXECUTIVE DIRECTOR OR EQUIVALENT NAME AND DATE:

I&R PROGRAM MANAGER OR EQUIVALENT NAME AND DATE:

SUMMARY OF ACCREDITATION DOCUMENTATION REQUIREMENTS

The following are the documents that you will be required to produce for both the Consultative Review and Remote Resource Database Review components.

In addition, you will be asked to write narrative descriptions and complete check lists which describe some of your practices. All of these practices are referenced in the current version of the AIRS Standards (which remains the best guide for accreditation preparation).

In situations where you are not asked to submit documentation, you will be asked to attest to the accuracy of your submission via the Certification of Documentation Agreement which must be signed by your Chair of Board/Advisory Committee Chair and the Executive Director/I&R Program Manager and submitted with your materials.

AIRS Service Delivery Standards: Documentation Requirements

- 001 - Policy and procedures for handling transactions via IM/chat, text/SMS messaging or other forms of social media.
- 002 - Confidentiality policies that address confidentiality of client records or use of Caller ID or other applicable technology.
- 003 - A sample of the form that is signed by I&R staff agreeing to the confidentiality policy. Do NOT send all of the forms your staff have signed!
- 004 - The nondisclosure form signed by others with access to confidential information.
- 005 - Your advocacy policy and procedures.
- 006 - Proof of your AAS certification or CONTACT USA accreditation (if you are skipping the Crisis Intervention section).
- 007 - The signed, written agreement you have with the crisis intervention center with which your I&R service has an arrangement.
- 008 - Your crisis intervention policies and procedures which must address:
 - Lethality risk assessment procedures.
 - Call handling procedures for specific types of emergencies
 - A staff debriefing protocol
 - Rescue services
 - Mandatory reporting requirements for child abuse and elder/dependent adult abuse.
- 009 - Crisis protocol per agreement with the local crisis center.
- 010 - The form your I&R specialists use to complete a lethality (risk) assessment. If your lethality assessments are in electronic format, submit a screen shot.

- 011 - Your follow-up policy and procedures
- 012 - Screen shots of your inquirer data collection form
- 013 - Your procedures regarding the information you collect about inquirers and how you use the information
- 014 - Follow-up results report
- 015 - A complete and current, finished and formatted report of your I&R activities including:
 - Total number of inquiries
 - Total number and type of problem/needs presented by inquirers
 - The number and/or percentage of inquiries involving Information only, Assessment and referral, Assessment without referral, Crisis intervention and Advocacy
 - Geographic and other demographic information about inquirers in aggregate form to protect the confidentiality of inquirers
 - Met/unmet needs
- 016 - An explanation or a user guide to the reports you provide for those on your distribution list
- 017 - A list of agencies/organizations to which the reports were provided
- 018 - Provide definitions of Terminology used to categorize contacts *(Note: This refers to how you calculate your total monthly/annual client contacts. Typically, this is a list of definitions of the types of calls received and documented for reporting purposes, including information calls, advocacy calls, crisis intervention calls, information and assessment, or information and referral calls, etc. This is a check that the mandatory calls types are being routinely collected according to your policy/procedures. It also includes any other pertinent information that clarifies what is included in a large total number – for example, if you state that you served 50,000 people last year – how was that number derived?)*

AIRS Cooperative Relationship Standards: Documentation Requirements

- 001 - Copies of agreements with other I&R programs in your community

AIRS Disaster Preparedness Standards: Documentation Requirements

- 001 - Your Emergency Operations and Business Contingency Plans.
- 002 - A disaster-related service request report, if you have had occasion to produce one.

AIRS Organizational Effectiveness Standards: Documentation Requirements

- 001 - The roster for your Board of Directors/Advisory Committee.
- 002 - Governance and Administrative policies and procedures manual(s).
- 003 - Most recent audit or review for the organization.
- 004 - An organization chart that reflects all of the positions within your agency. If you are part of a larger organization, submit a functional organization chart for the I&R service. The organization chart must be aligned with the job descriptions requested below.
- 005 - Job descriptions for all of the positions within the I&R service.
- 006 - The standardized form and screening procedure you use to evaluate each candidate's application or resume against the I&R staff position requirements.
- 007 - Your employment interview questions for each of the positions within your I&R service and the rating form you use to evaluate responses.
- 008 - Your succession plan for key staff.
- Policies and procedures relating to the use of off-site I&R staff.
- 009 - Backup policies and procedures.
- 010 - A Table of Contents for your training manual that shows a detailed list of all topics covered in your community resource specialist training program.
- 011 - A Table of Contents for your training manual that shows a detailed list of all topics covered in your database curator training program.
- 012 - A detailed, day-by-day training agenda for both your community resource specialists and database curators that outlines objectives, training methods (how material is presented) and materials, timeframes and outcomes for each section.
- 013 - Examples of subjective and/or objective evaluation tools used for measuring an I&R trainee's level of competency.
- 014 - Your I&R training evaluation form.
- 015 - Your I&R trainer evaluation form.
- 016 - An outreach report for the I&R service describing the plan, the outputs and outcomes (what was accomplished)
- 017 - Sample written supervision plan for I&R staff.
- 018 - Observation forms that are used for I&R staff.
- 019 - Performance appraisal forms that are used for I&R staff.
- 020 - Sample individualized performance improvement plan for I&R staff.
- 021 - Summary report from your call management system/ACD or the annual report you receive from your telephone company documenting call volume, number of abandoned calls, average speed of answer and average call length.
- 022 - Rating sheet for I&R call monitoring.
- 023 - Most recent customer satisfaction/quality assurance report for the I&R service.

- 024 - Written goals, objectives and I&R service work plan for the current year.
- 025 - The most recent evaluation report for the I&R service. (Note this is a 'self-reflection' report based on your own performance targets, but may incorporate other elements)

Resource Database Documentation Requirements

- 001 - Inclusion/Exclusion Policy
- 002 - Style Guide
- 003 - Customized List of Taxonomy terms used
- 004 - Database maintenance procedures
- 005 - Description of service area (including counties, towns, or regions)
- 006 - Report showing formal update dates
- 007 - List of agency names and their legal status type/agency type in order to compare types with your Inclusion/Exclusion policy
- 008 - Your Target Term Use policy