



AIRS Resource Database Self-Assessment Tool

How well do your records comply with the AIRS Standards?

“The Resource Database standards require that the I&R service develop, maintain, use and disseminate an accurate, up-to-date resource database that contains information about available community resources including details about the services they provide and the conditions under which services are available. The database includes resources that support the inquirer’s right to accurate, comprehensive and unbiased information and the ability of the I&R service to be a non-partisan, non-ideological and impartial information source for available nonprofit, government and for-profit services that meet the organization’s inclusion/exclusion criteria. The database is maintained by trained resource specialists.” AIRS Standards for Professional Information and Referral, Version 6.0, Introduction to Resource Database Standards.

Note that this document is drawn from the AIRS Standards and does not directly replicate the AIRS Accreditation criteria.

STANDARD 7: INCLUSION/EXCLUSION CRITERIA

“To ensure that the needs of the community are met, the I&R service shall develop criteria for the inclusion or exclusion of agencies and programs in the resource database. These criteria shall be uniformly applied and published so that staff and the public are aware of the scope and limitations of the database.”

Review Objectives: Verify that the I&R program has:

- an up-to-date and approved inclusion/exclusion policy
- followed its inclusion/exclusion criteria consistently (including any stated exceptions)
- database listings that are impartial (and can be shown to be impartial)
- trained its I&R specialists to understand the scope of the resource database
- published its policy on its website

<u>Standard 7 Review Process</u>	Yes/No
Carefully read your inclusion/exclusion policy. Is there a date that shows when it was last updated?	
Was the policy update completed within the last two years?	
Is there documentation describing the process used to make the decisions reflected in the last policy update?	
If there are for-profit organizations included, does the policy provide reasons for their inclusion?	
Note some of the types of services that are either explicitly required or excluded. Identify 6 Taxonomy terms that cover those services and use them to search your database. Are there any matches for searches using terms for excluded services? Are there any cases where searches using terms for required services retrieve no results?	
Select a representative but random facility type term within your database (for example, community centers, youth detention centers or the offices of political representatives). Conduct an external search (e.g. via a directory or Google). Have you included all of the resources within your geographic area?	
If you have included for-profit organizations, conduct the same external search exercise using that type of organization (for example, a home health care provider). Have you included all of the resources within your geographic area?	
Scan your customized Taxonomy for terms for political cause and issue-oriented action groups that should be balanced, such as Right to Life Groups and Reproductive Rights Groups. If included in your database, are there examples of both types of groups?	

Develop a short 10-question quiz based on your policy (for example, does our policy include doctor's offices? Does our policy exclude home care providers?). Ask your I&R specialists to respond to see if there are gaps in their understanding. Does everyone get over 90% correct?	
Is your inclusion/exclusion policy viewable on your website?	

STANDARD 8: DATA ELEMENTS

“The resource database shall contain standardized information about organizations that meet criteria for inclusion, the services provided by each organization, and the locations (sites) where those services are available. The standardized entry must contain all required data elements, where applicable (e.g., a mailing address is included if one exists). However, the specific data elements that are seen by a particular group of users (e.g., resource specialists, I&R specialists, the general public) may vary.”

Review Objectives: Verify that the I&R program has:

- consistently used the data elements that are required by the AIRS Standards
- only included data elements that are not in the Standards providing there is a documented explanation

<u>Standard 8 Review Process</u>	Yes/No
Select 5 agency records at random (for example, choose a number between 1 and 100 and then review records 89, 389, 589, 789, etc.). Compare the data elements in the agency, site and service/program areas with the required data elements. (Remember that an element does not have to be a field. Eligibility information, for example, may be described in the program narrative). Are all of the required data elements included in all of the records?	
If there is a data element that is not included within the Standards (for example, agency budget), have you documented the reason why you are collecting this information?	

STANDARD 9: CLASSIFICATION SYSTEM/TAXONOMY

“The I&R service shall use the AIRS/211 LA County Taxonomy of Human Services to index and facilitate retrieval of resource information, increase the reliability of planning data, make evaluation processes consistent and reliable, and facilitate national comparisons of data. Additional classification structures such as keywords may supplement the Taxonomy, but must be connected to the Taxonomy rather than functioning as independent indexing systems.”

Review Objectives: Verify that the I&R program has:

- a current license to use the Taxonomy
- updated the Taxonomy within the last 12 months
- customized the Taxonomy to meet its needs
- the means to review a list of Taxonomy terms that have been used
- indexed consistently
- ensured, if keywords are used, that these are aligned with Taxonomy terms

<u>Standard 9 Review Process</u>	Yes/No
Is the resource database indexed using the AIRS/211 LA County Taxonomy?	
Do you have a current license from 211 LA County to use the Taxonomy?	
Has the Taxonomy been updated within the past 12 months? The Taxonomy updated is a process that ensures that the version of the Taxonomy in your software includes new terms, revised definitions of existing terms, new used references, etc., that have been released by 211 LA County.	

Do you have a document that shows your customized version of the Taxonomy (i.e. the terms and branches of terms that have been either eliminated or included as indexing choices)?	
Is there a list (or view) of all of the Taxonomy terms that have been used to index records in your database?	
If keywords are being used, is there a document that shows that each one is aligned with one or more specific Taxonomy terms?	

STANDARD 10: CONTENT MANAGEMENT AND INDEXING

“The I&R service shall ensure through training, database management procedures and supervision that resource specialists organize information about human service organizations into database records that accurately and concisely reflect the agency, its locations and its services/programs; index the services provided by each organization using the AIRS/211 LA County Taxonomy of Human Services in accordance with recognized and consistently applied practices; and assign other search keys in a way that accurately reflects the conditions under which services are available.”

Review Objectives: Verify that the I&R program has:

- a style guide that describes how all data elements should be entered
- consistently applied the rules in its style guide
- applied organization naming rules consistently
- indexed programs/services consistently
- ensured that indexing matches the services described in the corresponding text field
- indexed target terms according to their own protocols
- only indexed primary services
- eliminated examples of double indexing unless these have been specifically documented as allowable exceptions
- records that reflect permanent disaster services
- ensured resource records appear professional and that there are no grammatical, spelling or data entry errors

<u>Standard 10 Content Management and Indexing</u>	Yes/No
Is there a style guide for data entry?	
Does the style guide cover the data entry rules for all of the data elements/fields that you identified in your review of Standard 8?	
Does the style guide provide rules on how to name organizations and do those rules specify how to name government departments?	
Does the style guide provide a framework for creating narrative descriptions?	
Find 10 organizational records at random (e.g. pick a number between 1 and 100, then work backwards from the last record in your database – 1924, 1824, 1724, etc.) and examine the entire record (agency, site(s) and all attached services) in relation to the requirements of your style guide. Pay particular attention to the entry of addresses in terms of permitted abbreviations and to narrative descriptions. Accepting there might be a handful of items that you feel can be improved, does the data as entered conform to the rules in your style guide?	
Create a listing of your entire database in alphabetical order by organizational name. Review the list for consistency and compliance with the rules in your style guide. Pay particular attention to listings where the word “department” is used or references to the names of individual counties or of your state/province. Look for inconsistencies, e.g., instances of both “Department” and “Dept” or “State of Green” and “Green State”. Does the list verify that the rules of your style guide are being applied correctly?	
Review the records of 3 multisite agencies to evaluate how accurately the structure of the agency is reflected. Can you verify that the principle unit of the agency and any additional sites are correctly identified, and that the services are properly connected to the sites where they are available?	

<p>Identify the names of 3 other multiservice agencies within your database and review their websites, making notes of the programs/services they offer. Are all of the services/programs the agency offers that meet your inclusion criteria reflected in the entry for the organization in your resource database?</p>	
<p>Review the narrative descriptions of your service records and find 5 examples of references to secondary services (focus on the records that are more likely to contain these such as domestic violence shelters that offer counseling, or job training programs that offer job placement services). Have you refrained from indexing those secondary services and are they clearly described as such in the service description?</p>	
<p>Identify 5 commonly used Taxonomy terms within your database (e.g. rent payment assistance). Search the database using each of those terms and review the records that are retrieved. Are the same Taxonomy terms being used to consistency index records that are providing the same service?</p>	
<p>Search your database using 10 different Taxonomy target terms that have been used. Review each of the first two matching records. Are the target terms being used accurately in accordance to your own protocols and only in conjunction with a Taxonomy service or facility term?</p>	
<p>Read the definition of double-indexing (if unsure, see the document on the AIRS Networker community called The Taxonomy). Can all of your resource specialists explain double-indexing?</p>	
<p>Search your database to try to identify 10 records that have been indexed using more than one Taxonomy term other than a target term. Review whether they are examples of double-indexing. Do these records follow acceptable indexing practices?</p>	
<p>Do you have records for disaster services in your database? If yes, are they indexed using terms in the TH (Disaster Services) section of the Taxonomy?</p>	
<p>Looking at all of the records that you reviewed as part of this process, did you encounter and correct fewer than 10 instances of a spelling or data entry mistake?</p>	

STANDARD 11: DATABASE SEARCH METHODS

“Information in the resource database shall be accessible in ways that support the I&R process including search and retrieval by organization, site and program name and by the type of service available. It shall be possible to narrow service searches by target population, geographic area served, proximity to the inquirer’s location and other filters such as age, gender or languages that are relevant in a particular community.”

Review Objectives: Verify that the I&R program has the ability:

- to search by organization, site and program names (including AKAs)
- to search by Taxonomy terms and Taxonomy use references
- to search by both the location of a service and the area served by a service
- to filter searches by key elements such as available languages

Note that in some cases, what is actually being assessed in this area is the ability of your I&R software to execute certain functions. Although in the immediate term, this might be largely out of your control, in the long term, you must ensure that you are operating with a software system that meets the needs of your agency, your community and the AIRS Standards.

<u>Standard 11 Database Search Methods</u>	Yes/No
Find 3 examples of AKAs (for agency names) within your database. Search using those AKAs. Are the correct records retrieved?	
Find 3 examples of site records within your database. Search using the names of those site records. Are the correct records retrieved?	
Find 3 examples of program names within your database. Search using those program names. Are the correct records retrieved?	
Find 3 Taxonomy terms that have use references (for example, rent assistance is a use reference for rent payment assistance). Search the database using the use references. Are the correct records retrieved?	

Can a database search be filtered with the area served?	
Can a database search be filtered by other factors such as language (e.g. all programs providing options for service in Spanish or Haitian Creole)?	

STANDARD 12: DATABASE MAINTENANCE

“The resource database shall be updated through continual revision at intervals sufficiently frequent to ensure accuracy of information and comprehensiveness of its contents.”

Review Objectives: Verify that the I&R program has:

- an up-to-date database
- a system for annually updating information as well as modifying information throughout the year
- a process for identifying new organizations and programs that meet inclusion criteria

<u>Standard 12 Database Maintenance</u>	Yes/No
Is there a way of differentiating a comprehensive database update (i.e., an annual verification of the entire record by the relevant organization usually accomplished by a survey process) from a database modification (i.e., a change to one or more pieces of information contained in a record that may emerge over the course of a year)?	
Have you completed annual surveys for all of the active records in your resource database within the last 12 months?	
Is there a documented process for modifying database information when information about changes is discovered between annual updates?	
Does the survey process include a method of increasing the rate of return by trying different survey methods and regularly reviewing the list of agencies that have yet to complete their annual update?	

<p>Does the process include guidelines for how to handle agencies that have not returned an update despite multiple attempts? Are there different rules for agencies that are critical to the content of the database?</p>	
<p>Does the process include occasionally checking selected agency websites to see if the information coming in matches what is being publicly promoted?</p>	
<p>Is there a documented process for identifying new agencies and programs?</p>	
<p>Assuming the new program identification process involves activities such as monitoring county grants, United Way funding decisions, attending networking meeting, etc. are these activities regularly taking place?</p>	