

Resource 101



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LIFE LINE

Resource 101 Summary



- Resource File “Container”
- Inclusion / Exclusion Criteria
- Data Entry Standards
- Organization / Classification System
- Updating Cycles
- Questions and Answers



Resource File “Container”

- Who will use your resource file?
 - Your own organization
 - Other organizations in the community
- What products might you want to make for your own organization or others?
 - Comprehensive directory
 - Specialized directory
 - Mailing labels

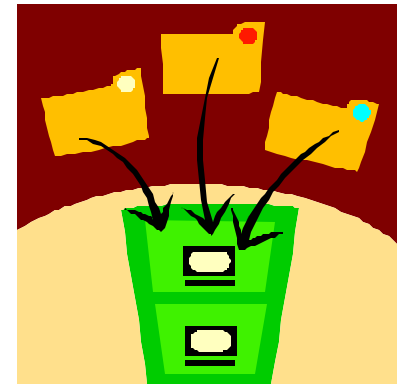


Resource File “Container”

- Where will you store your data?
 - Manual system
 - Simple
 - Limited
 - Computerized system
 - More ways to search
 - Faster
 - Less updating

Inclusion / Exclusion Criteria

- Provides consistency
- Legitimizes decisions
- Reduces necessity for case-by-case decisions



- Should be formal, written policy



Inclusion / Exclusion Criteria

- Not for profit agencies providing community services
 - Health and human services vs. other services
 - “Essential” services
- Government agencies providing health and human services

Inclusion / Exclusion Questions

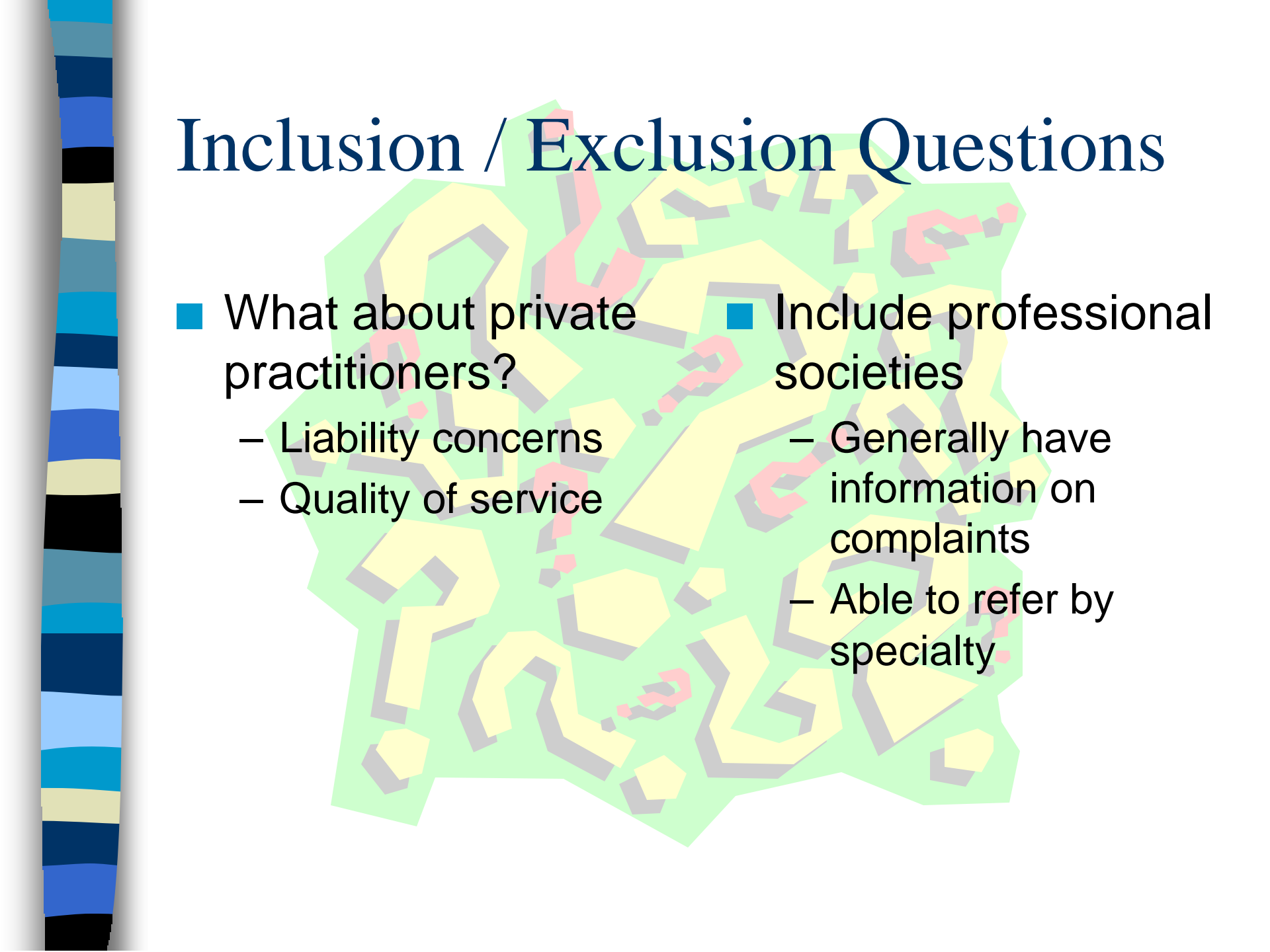
- What about proprietary agencies?

- Child care
- Home health care
- Adult homes
- Substance abuse

- Include those that are

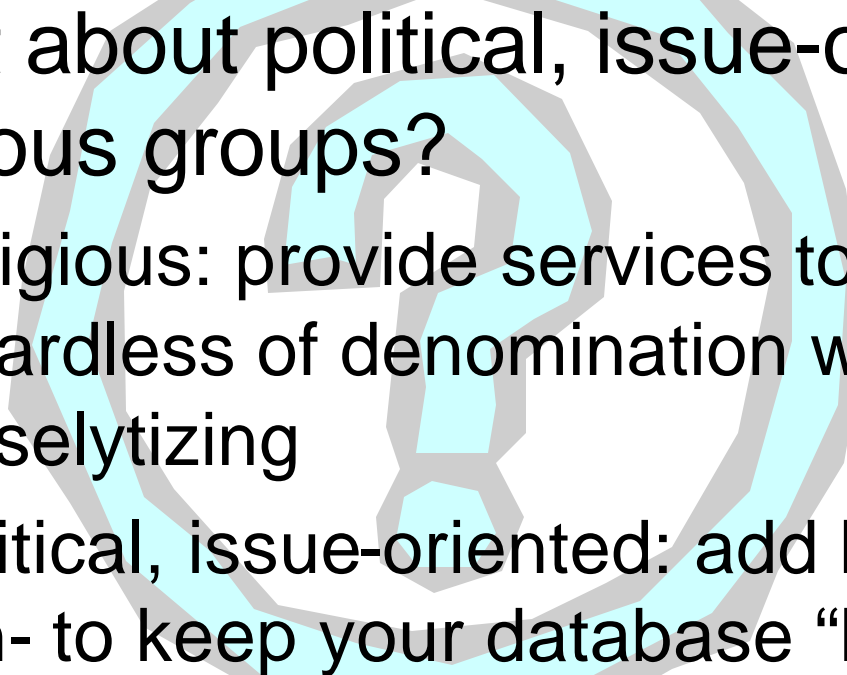
- Licensed
- Low cost
- Accept Medicaid / Medicare

Inclusion / Exclusion Questions

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- What about private practitioners?
 - Liability concerns
 - Quality of service
 - Include professional societies
 - Generally have information on complaints
 - Able to refer by specialty



Inclusion / Exclusion Questions

- 
- What about political, issue-oriented, or religious groups?
 - Religious: provide services to anyone, regardless of denomination without proselytizing
 - Political, issue-oriented: add both pro- and con- to keep your database “balanced”



Inclusion / Exclusion Questions

- What about membership organizations?
 - Those groups whose meetings are open to non-members
- What about self-help (mutual support) groups?
 - Those groups which are incorporated OR are functioning under the auspices of an incorporated agency which meets your inclusion criteria



Avoid Duplication of Effort

- What specialized information and referral agencies are available in your area?
- What type of information do they have?
- Use them as a “Gateway”
 - Less work for you
 - Avoids multiple requests for information

Allow Flexibility



- Resource File Criteria may differ from a particular directory's criteria
 - Directory may be for a specialized population or area
- If criteria differ, you should be sure to make the directory or product's criteria clear

Data Entry Standards



- Consistency
- Printed materials
- Data elements (fields)
 - Fields available in computer software
 - Think about customers' needs
 - What fields do you currently track?

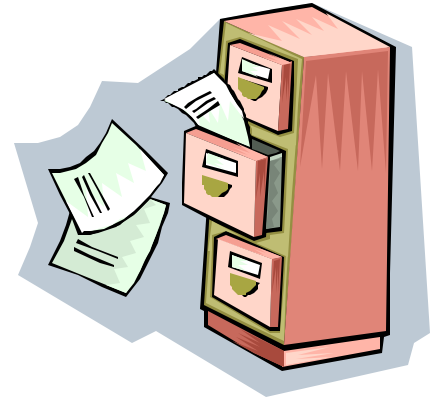


Data Entry Standards

- Things to consider:
 - Street addresses - to abbreviate or not?
 - Capitalization (agency names in all caps?)
 - Narrative phrases
 - “No fee” or “free” or “none”
 - “Appointment required” or “need appointment”

Types of Data Elements

- Agency information
 - Name, address, phone
 - General purpose
- Narrative descriptions
- Search keys
- Any “in-house” information





Sample Data Entry Fields

- Eligibility
- Application procedure
- Documents required
- Fees and payment method(s)
- Contact person



Classification System

- How to find the data once it is in the database
 - By agency
 - By geography
 - By service

Classification System



■ AIRS / InfoLine Taxonomy

– National Standard

- Recognized by AIRS, NYS AIRS, Library of Congress, US Dept. Health and Human Services, United Way of America, FLAIRS, and more

– Helps us use the same terminology

- Aids in collecting statistics
- Aids in combining data with other organizations

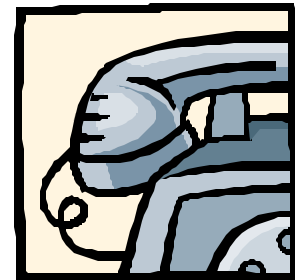


Classification System Pitfalls

- Don't confuse primary with secondary services
- Avoid editorials
- Don't confuse administrative offices with service sites
- Don't confuse referral to a service with service

Updating Cycles

- Establish a regular updating cycle
- Determine how validation will be conducted
 - Mail
 - Telephone
- Decide how follow up will be handled



Validation Tools

- How will information be sent (format)
- Worksheet for new agencies
- Worksheet for programs/services



MAKE YOUR DATABASE
EVEN BETTER!

