

Readiness for AIRS Accreditation

AIRS realized many years ago that the key to growth and improvement in the I&R profession was development of a process that measures adherence to the *Standards for Professional Information & Referral* by individual I&R services. The AIRS Standards Committee actively pursued this goal over a two-year period and in 1996, the AIRS Board approved the first set of Accreditation Standards (now called Accreditation Criteria) for I&R. The Standards are the foundation for AIRS Accreditation. They include bottom line requirements for all I&R services wanting to be accredited as well as recommendations regarding further enhancements of I&R operations for organizations currently positioned to implement them. Since 1996, the *Standards* and the Accreditation Criteria have been updated and improved. As a result, the accreditation process has become more demanding. Most of the I&R services that have begun the process have completed it successfully, and all have encouraged AIRS to keep the bar high. A few I&R services have been unprepared for the amount of work they faced within the 10-month timeframe and have struggled. Others have hesitated to begin fearing that they are not ready. It has become clear that the field needs a tool that helps I&R services make an assessment of their programmatic and organizational readiness for Accreditation. AIRS is pleased to announce the availability of such a tool and these instructions for using it¹.

Applying for accreditation is a major decision for any organization and should not be entered into lightly. In addition to programmatic and organizational readiness, it is important for I&R services to assess the cost and benefits of the program to ensure that they are fully aware of the tradeoffs. Most will find that accreditation is a win-win situation. Costs generally include the following:

- Potential costs for major structural changes in the organization, e.g., change in bylaws, governance, policies and procedures and methods of operation.
- Staff costs related to the compilation of documentation, participation in site visits and ongoing compliance with accreditation requirements.
- The application fee of \$3,000.
- Site visit expenses (travel, lodging, meals for the site-visit team).

Benefits of Accreditation include the following:

- Objective evidence of achievement in the areas of service quality and effectiveness, community involvement and organizational stability.
- Demonstrated commitment on the part of your leadership to meeting the highest standards in the field.
- Enhanced credibility in the eyes of the public and your other stakeholders.
- Stronger position in what is emerging as a competitive field, e.g. an edge in competitions for the lead agency status in local 2-1-1 systems.
- Expanded access to new markets, government assistance and foundation grants.
- Improved protection against legal challenges.
- Broader recognition by your peers in the field.

Accreditation Readiness Tool

The Accreditation Readiness Tool is organized according to the five major areas of the *Standards* which are reflected, in turn, in the Accreditation Manual. The areas are as follows:

¹ Many thanks to Fred Koss, Lucinda Nord and the Indiana 211 Partnership, Inc. for allowing AIRS to adapt their matrix used in Indiana to assess an I&R service's readiness to begin the 2-1-1 application process.

Area I:	Service Delivery
Area II:	Resource Database
Area III:	Reports and Measures
Area IV:	Cooperative Relationships
Area V:	Organizational Requirements

The accreditation process requires that applicant agencies demonstrate compliance with accreditation criteria that relate to 19 separate **AIRS Standards** within the above five areas and a total of 89 different **Requirements**. Some I&R organizations may meet all accreditation criteria at the time they apply. However, experience has shown that most applicants are deficient in one or more areas, some of which are easy to remedy, others of which will require significant time and energy. The purpose of the tool is to help you, as a potential applicant agency, do a self-assessment of your readiness prior to applying. The tool differentiates between criteria that can be accomplished while you are in the initial 10-month process and those that you need to have in place prior to submitting your application. You can rate your current status on a three point scale: the work in a particular area has been done, is in progress or substantial work is needed to achieve compliance. After completing the progress assessment for all 89 requirements, you can then review the difficulty factor for the areas in which your organization is deficient. If you have a significant number of difficult requirements that are either in process or you have not yet begun, the AIRS Accreditation Committee recommends that you wait to apply until more progress has been achieved.

Each of the 89 requirements is listed in a separate row in the attached document. There is an X next to the requirement in either column “**In Place When Apply,**” or “**Complete During Process.**”

- If the X is in column In Place When Apply, then it is recommended that you have this requirement in place at the time you apply for accreditation.
- If the X is in column Complete During Process, then compliance is required before you complete the accreditation process, but you can likely accomplish it during the allocated time period.

The next three columns allow you to assess your current status relative to each requirement. The options are:

- **Done** – your organization has met the requirement and can provide substantiating documentation.
- **In Progress** – you are working on, and anticipate that within the 10-month timeframe, you will be able to complete the requirement and assemble substantiating documentation.
- **Needs Substantial Work** – You have done very little relative to the requirement or have not begun.

The final column provides a space for notes regarding an action plan for meeting the requirement and estimated time lines.

Quick Checklist to Determine Readiness for Application to AIRS for Accreditation

Reminders:

- Application fee is non-refundable (\$3,000, which may be paid in two installments)
- Once you receive packet from AIRS, you have 10-months to submit your initial documentation (a large binder or more)
- Most agencies are required to submit their documentation 2-4 times before being approved for site visit.
- Site visit requires a visit by an Accreditation review team to verify documentation matches services.

Key questions to determine readiness for application to begin Accreditation process:

- 1) Does your agency meet all of the following criteria? If not, can you explain why or build capacity to meet and document criteria within 10- months? Based on experience of others,
 - a) Do you have a structured training program for I&R Specialists and how well is it documented?
 - b) Does your agency complete annual resource database updates (every field in every record updated at least annually)?
 - c) Does your agency have all the programs classified using the AIRS/INFOLINE Taxonomy? If so, is your process for using the Taxonomy documented?
- 2) Does the agency have a designated person to coordinate Accreditation documentation and process?
- 3) Of the following list of items, does your agency have a formal policy or process? If not, how hard would it be to document? Where appropriate, have they been approved by your board or advisory board?
 - a. I &R Specialist Training (initial and ongoing)
 - b. I&R Specialist supervision
 - c. Resource Database policies/processes for updating records (process, style guide)
 - d. Confidentiality policy
 - e. Schedule of training
 - f. New employee orientation materials
 - g. Organization chart
 - h. Job descriptions
 - i. Job application forms
 - j. Charter/articles of incorporation
 - k. List of advisory board/committee members
 - l. Organization/program mission statement
 - m. Bylaws or other authorizing statutes
 - n. Written goals and objectives for the current year
 - o. Most recent community needs assessment
 - p. Evaluation/survey forms
 - q. Advocacy policy
 - r. Follow up policy
 - s. Technology policy/procedure
 - t. Sample screen shots and statistical reports generated from your I&R system
 - u. Employee handbook
 - v. Code of Ethics
 - w. Proof of agency insurance

- x. Most recent annual budget and financial statements
 - y. Sketch of agency's physical layout
- 4) What is your organization's reputation in your community and can you document your relationships with key organizations? Where appropriate, do you have a memorandum of understanding (emergency organizations)? (Remember that you must survey a percentage of your total database and responses are returned directly to AIRS.)

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

AREA I: SERVICE DELIVERY	The standards in AREA I describe the service delivery functions essential for providing information and referral and assuring access for all, including a brief individual assessment of need; a blend of information, referral and advocacy in order to link the person to the appropriate service; and follow-up as required.
---------------------------------	---

Standard 1: Information Provision

The I&R service shall provide information to an inquirer in response to a direct request for such information. Information can range from a limited response (such as an organization's name, telephone number, and address) to detailed data about community service systems (such as explaining how a group intake system works for a particular agency), agency policies, and procedures for application.

	X	The I&R service shall provide information to an inquirer in response to a direct request for such information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 2: Referral Provision

The I&R service shall provide information and referral services in which the inquirer has one-to-one, human contact with an I&R specialist (paid or volunteer). The referral process consists of assessing the needs of the inquirer, identifying appropriate resources, assessing appropriate response modes, indicating organizations capable of meeting those needs, providing enough information about each organization to help inquirers make an informed choice, helping inquirers for whom services are unavailable by locating alternative resources, and, when necessary, actively participating in linking the inquirer to needed services.

There are a number of requirements related to Referral Provision including the following:

	X	The I&R service shall provide referral services in which the inquirer has one-to-one, human contact with an I&R specialist who does an assessment of the individual's need and refers him or her to one or more organizations that provide the required services. In contrast to information giving, the definitive element distinguishing a referral is that the inquirer is aware of the problem, but requires assistance in determining the specific nature of his/her need and specific solution options that may be available to resolve it (as stated or redefined); and/or in addressing additional problems which may be brought to light through the assessment process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
	X		Trained I&R specialists shall provide the I&R service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Professional staff shall seek Certified Information and Referral Specialist (CIRS) status through the AIRS Certification Program when eligible to do so or, if applicable in a particular field, certification through another program recognized at the state/provincial, regional or national level. Minimum Expectation: For Accreditation purposes, 25% of eligible staff (including part-time staff and volunteers) must be certified within one year of becoming eligible. The 25% refers to FTE, full time equivalency staff hours.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	In the case of I&R services other than lead agencies taking 2-1-1 calls, hours of service shall be appropriate to community needs. At a minimum, the I&R service shall be available during normal business hours. If the I&R service is not available on a 24-hour basis, it shall provide an answering system when staff are not present that gives inquirers the number and office hours of an organization that will offer service in an emergency. If the I&R service has an arrangement with another agency to provide 24-hour coverage, that arrangement shall be documented in a formal memorandum of understanding (MOU), memorandum of agreement (MOA) or service level agreement (SLA). National I&R services not available on a 24-hour basis shall address the issue of people calling from other time zones. Minimum Expectation: If the I&R service is not 24-hour, it must have back-up arrangements and an MOU, MOA or SLA with the agency providing coverage.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	The lead agency taking 2-1-1 calls is responsible for ensuring that I&R services are available on a 24-hour basis, year round. If the I&R service does not itself provide service 24 hours and has an arrangement with another agency to provide after-hours coverage, that organization must meet all Service Delivery and Resource Database standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	If the I&R service does not, itself, provide a formal crisis intervention service but receives calls from people who are in crisis, it shall be connected by prearranged protocols and, if feasible, direct telephone transfer, to an appropriate agency that does. A formal MOU, MOA or SLA shall be in place. The I&R specialist shall have the skills to meet the needs of people who are in crisis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
	X		During hours of operation, the I&R service shall provide timely access to an I&R specialist. The I&R service shall have a method for tracking call volume, number of abandoned calls, average speed of answering and average call length; and shall have a written policy regarding acceptable waiting times and abandoned call rates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
	X		The I&R service shall provide its core telephone service at no cost to the inquirer. The I&R service shall not charge inquirers for the service it provides (via a 900 number, for example). The I&R service is not required to provide toll free access to its service via an 800 number.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

Action Plan/Time Estimate:

		X	The I&R specialist (paid and volunteer) shall have the skills to meet the needs of difficult inquirers (e.g., people who are angry and hostile, are manipulative or call frequently with the same problem).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	The I&R specialist (paid and volunteer) shall have the skills to meet the needs of special populations (e.g., older adults, people with disabilities, sexual minorities).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

	X		The I&R service shall have a written policy which ensures that the confidentiality of inquirers is preserved and shall have agreement forms that staff and others with access to confidential information sign to document their intent to comply.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	--	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	The I&R service shall provide barrier-free access to its services for individuals and groups who have special needs, e.g., TDD/TTY access for people with hearing impairments; language access for inquirers who speak languages other than English; and physical access for people with disabilities if the I&R service assists inquirers at its facility. Minimum Expectation: The agency must have a TDD/TTY, provide access to interpreters that speak all languages appropriate to the community, and have accessible facilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria			Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>	

Action Plan/Time Estimate:

		X	The I&R service shall utilize technology that improves access to service and enhances its ability to serve inquirers efficiently and effectively while preserving the level and quality of its core services. "Technology" includes telephone systems, telephony, telecommunications, I&R software packages, directories on diskette and self-service mechanisms such as automated attendants/interactive voice response systems, fax-on-demand, community kiosks and searchable I&R databases on the Internet.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	When the I&R service provides indirect access to its database via its Web site, an automated attendant (menu-driven telephone system), a directory, a community-based kiosk or other gateway, it shall include either e-mail access to an I&R specialist or a telephone number for such access.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	If the I&R service uses telephone technology that allows for the collection of identifying information about an inquirer without his or her explicit permission, it shall develop policies and procedures that protect the inquirer's right to privacy and anonymity while preserving the I&R specialist's ability to provide for the individual's safety should personal identification become necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards		Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>		<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	The I&R service shall develop strategies and procedures to ensure that all inquirers receive comparable benefit, either directly or indirectly, from the use of technology. It shall evaluate the pros and cons of a particular piece of technology prior to implementation to assure that one group of inquirers does not benefit while the needs of other groups are ignored.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							
		X	The I&R service shall have access to the Internet for locating information helpful to inquirers and a policy for staff use of the Internet.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							
Standard 3: Advocacy/Intervention							
The I&R service shall offer advocacy to ensure that people receive the benefits and services to which they are entitled and that organizations within the established service delivery system meet the collective needs of the community. For purposes of these standards, "advocacy" does not include legislative advocacy (lobbying). All advocacy efforts shall be consistent with written policies established by the governing body of the I&R service and shall proceed only with the permission of the inquirer.							
	X		The I&R service shall intervene on behalf of individuals to help them establish eligibility for or obtain needed services when they have been denied benefits or services to which they are entitled, when they need assistance to communicate their needs to a service provider or otherwise effectively represent themselves, or when they have a complaint about a service. Individual advocacy efforts seek to meet individual needs without attempting to change social institutions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	The I&R service shall advocate for changes in community conditions, structures or institutions when modifications in the service delivery system as a whole are required to ensure the adequate availability of essential community services. Such advocacy may include the collection, analysis, and dissemination of data on human service needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
Standard 4:Follow-Up The I&R service shall have a written policy which addresses the conditions under which follow-up must be conducted. The policy shall mandate follow-up with inquirers in endangerment situations and in situations where the specialist believes that inquirers do not have the necessary capacity to follow through and resolve their problems. The policy must also specify a percentage of other inquiries for which follow-up is required in order to assess overall service performance. Additional assistance in locating or using services may be necessary.						
	X		The I&R service has a written policy that addresses the conditions under which follow-up must be conducted. The agency conducts follow-up with inquirers in endangerment situations and in situations where the specialist believes that the inquirer does not have the necessary capacity to follow through and resolve his or her problem. The follow-up policy specifies a percentage of other inquiries for which follow-up is required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
AREA II: RESOURCE DATABASE	The standards in Section II describe the requirement that the I&R service shall develop, maintain, and/or use an accurate, up-to-date resource database that contains information about available community resources including detailed data on the services they provide and the conditions under which services are available. If the I&R service maintains a resource database of Web sites on the Internet, Resource Database Standards 5 through 9 still apply.					
Standard 5: Inclusion/Exclusion Criteria 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 will be aware of the scope and limitations of the database.						
There are a number of requirements related to Inclusion/Exclusion Criteria including the following:						

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
	X		The I&R service shall have a written policy that describes inclusion/exclusion criteria for the resource database. The I&R service shall review the inclusion/exclusion criteria on a regular basis (at a minimum, every three years) to ensure that they continue to meet the changing needs of the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	These criteria shall be published so that staff and the public will be aware of the scope and limitations of the database.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	These criteria shall be uniformly applied.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	If the I&R service is comprehensive, the inclusion/exclusion criteria shall address the needs of all groups in the community; shall include government, nonprofit and critical for-profit organizations; and may include other for-profit organizations and entities such as support groups that are not incorporated as organizations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	If the I&R service is specialized, the inclusion/exclusion criteria shall adequately address the needs of its target population and shall have referral points for types of services that are excluded.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria	Current Status			
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

		X	If the I&R service charges a fee for the inclusion of organizations in its database, that practice shall be published as a part of its inclusion/exclusion criteria.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 6:Data Elements

A Standardized profile shall be developed for each organization that is part of the local community service delivery system or other geographic area or service sector covered by the I&R service.

	X		A standardized profile shall be developed for each organization in the database. The agency profile shall include (but not be limited to) the mandatory data referenced in the Standards, that the I&R service shall collect when appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	--	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 7:Indexing the Resource Database/Search Methods

Information in the resource database shall be indexed and accessible in ways that support the I&R process.

		X	Information in the resource database shall be retrievable by a variety of search methods including, alphabetically by organization name, type of service provided, specific target population, and geographic location.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 8: Classification System (Taxonomy)

The I&R service shall use a standard service classification system to facilitate retrieval of community resource information, to increase the reliability of planning data, to make evaluation processes consistent and reliable, and to facilitate national comparisons of data. Additional classification structures such as keywords may supplement the Taxonomy.

There are a number of requirements related to the AIRS/INFO LINE Taxonomy including the following:

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
	X		I&R services in the United States shall use the AIRS/INFO LINE Taxonomy of Human Services (formally titled A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and Definitions for the Field) or have a clearly written plan for implementation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
	X		In other countries, the standard shall either be a nationally adopted classification system or the AIRS/INFO LINE Taxonomy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Local modifications shall be reported to the Taxonomy system administrator for consideration for inclusion in the master system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The I&R service shall have procedures in place to integrate Taxonomy updates. All appropriate Taxonomy codes in updates shall be integrated within 6 months of issuance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
Standard 9: Database Maintenance The resource database shall be computerized, maintained by trained resource staff and updated through continual revision at intervals sufficiently frequent to ensure accuracy of information and comprehensiveness of its contents						
There are a number of requirements related to database maintenance including the following:						

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	The resource database shall be computerized or the I&R service shall have a clearly written plan for computerization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The resource database shall be maintained by trained resource specialists (paid and/or volunteer). Resource staff shall seek Certified Resource Specialist (CRS) status through the AIRS Certification Program when eligible to do so or, if applicable in a particular field, certification through another program recognized at the state/provincial, regional or national level. Minimum Expectations: For Accreditation purposes, 25% of eligible staff (including part-time staff and volunteers) must be certified as resource specialists. The 25% refers to FTE, full time equivalency staff hours.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The resource database shall be totally updated, at least annually, by surveys, telephone contact or on-site visits to organizations listed in the database. Records in the database shall include the date of last update.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Procedures shall be in place for integrating interim information changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Procedures shall be in place for identifying new agencies, acquiring required information about them and including them in the database.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria			Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>	

Action Plan/Time Estimate:

		X	Update verification procedures shall be in place to ensure accuracy. The I&R service may, for example, request a signature on the update form.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	The I&R service shall safeguard its resource database through duplication or computerized back-up. The back-up database shall be kept in a secure location where it will be protected from destruction or theft.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

AREA III: REPORTS AND MEASURES The standards in Section III describe the inquirer data collection, analysis and reporting functions of the I&R service.

Standard 10: Inquirer Data Collection
The I&R service shall establish and use a computerized system for collecting and organizing inquirer data which facilitates appropriate referrals and provides a basis for describing requests for service, identifying service gaps and overlaps, assisting with needs assessments, supporting the development of products, identifying issues for staff training and facilitating the development of the resource information system. Inquirer data includes information gathered during follow-up as well as that acquired during the original contact.

	X		The agency has a computerized, systematic method for recording inquirer data for each contact. For purposes of accreditation, a contact is defined as an incoming call or other mechanism by which an inquiry is initiated. The I&R service shall have in place a written policy describing security precautions which protect and keep confidential data collection forms and inquirer information. The security system shall conform to all applicable statutes and shall include provisions for the storage, retrieval, use and ultimate disposition of records. Unless the I&R service is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	--	---	--------------------------	--------------------------	--------------------------

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria	Current Status			
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

			involved in a cooperative service delivery arrangement in which client records are shared, those outside the I&R service shall see only aggregate data.			
--	--	--	---	--	--	--

Action Plan/Time Estimate:

Standard 11: Data Analysis and Reporting

The I&R service shall develop reports using inquirer data and/or data from the resource database to support community planning activities (or planning at other levels), internal analysis and

		X	At a minimum, the reports shall have the ability to provide statistics regarding types of calls (information, referral, crisis and advocacy), follow-up results, inquirer characteristics, service requests, service use, unmet needs, community assets and gaps and duplications in services. The reports shall also provide data to measure the effectiveness of the I&R service and service outcomes. Information gathered during the follow-up process shall be used as a further means of evaluating the effectiveness of existing community service providers and for identifying gaps and overlaps in community services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

**AREA IV:
COOPERATIVE
RELATIONSHIPS**

The standards in Section IV focus on the responsibilities of the I&R service to the local I&R system, the local community service delivery system, and state or provincial, regional, national and international I&R networks.

Standard 12: Cooperative Relationships within the Local I&R System

In communities which have a multiplicity of comprehensive and specialized I&R providers, the I&R service shall develop cooperative working relationships to build a coordinated I&R system which ensures broad access to information and referral services, maximizes the utilization of existing I&R resources, avoids duplication of effort and encourages seamless access to community resource information. I&R services within the system may choose to be “full service” programs performing all necessary I&R functions within their designated service area; or may prefer to partner with one or more I&R services to share those functions. (E.g., one I&R service might build and maintain the resource database and another might assume responsibility for service delivery.)

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	I&R services within the system shall coordinate their service delivery to avoid duplication of effort and encourage service integration. Local I&R service systems shall work cooperatively with those in neighboring regions to ensure that all areas within a region, state or province have access to I&R services, particularly when 2-1-1 is implemented within the area. Comprehensive and specialized I&R services that are part of the system shall develop and define their working relationships and formalize them through a MOU or MOA. At a minimum, comprehensive I&R services shall have written agreements with the local child care resource and referral agency, the senior I&R/A agency, the crisis intervention service, 911 and 311 services, agencies that provide for volunteer and donation management, other organizations with clearinghouse functions and, where applicable, the military family service/support center. Specialized I&R services must have an MOU with the comprehensive I&R service unless they are also the comprehensive I&R.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	If a local database collaborative exists, the I&R service must participate. If none exists, the I&R service should be working proactively to create one if there are other I&R services maintaining resource information. If there is an established database collaborative or one is being discussed, the I&R service needs to have raised the issue of using the Taxonomy as a common classification system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The I&R service needs to be pursuing the possibility of pooling statistics regarding total number of inquiries and types of needs with the I&R services with which it has an MOU. It is expected that in most communities the comprehensive I&R service will take the lead in these discussions. Specialized I&R services are expected to participate once discussions are underway.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria			Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>	

Action Plan/Time Estimate:

		X	It is expected that the I&R service will engage in other cooperative planning and decision making activities with other I&R services as a part of building an I&R system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	---	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 13: Cooperative Relationships within the Local Service Delivery System
The I&R service shall strive to develop cooperative working relationships with local service providers to build an integrated service delivery system which ensures broad access to community services, maximizes the utilization of existing resources, avoids duplication of effort and gaps in services, and facilitates the ability of people who need services to easily find the most appropriate provider.

There are a number of requirements that relate to this standard including the following:

		X	The I&R service shall work with local service providers to assess the viability of using its call center capacity as the first point of contact for calls into the system and attempt to persuade the city, county or other local authority to avoid proliferation of separate hotlines. Minimum Expectation: The I&R service should take advantage of opportunities to use its I&R number as a point of contact for calls into the service delivery system, e.g., job training opportunities, disaster services, shelter beds; and should attempt to persuade the city, county or other authority to avoid setting up separate hotlines. For accreditation purposes, the I&R service needs to describe situations where this objective has been achieved and be in discussions or develop a plan for where this type of arrangement may be possible. The requirement deals with the I&R system being the first point of contact, not any particular I&R service within the system. This requirement cannot be met by providing a rationale for the value of information and referral in general.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	---	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	The I&R service shall develop cooperative working relationships that assure utilization of its resource database by other service providers in the system. Minimum Expectation: The I&R service is sharing information in its database with local service providers in the form of a print or electronic directory, a searchable database on its Internet Web page, a copy of its database and search software or other similar mechanisms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The I&R service shall explore opportunities for joint service delivery with local service providers, e.g., participation in local case management collaboratives, encourage collaborating service providers to participate in community-wide data collection, analysis and reporting activities, where appropriate, or engage in other activities that improve the ability of the service delivery system to respond to the needs of inquirers. Minimum Expectation: The I&R service can describe other activities of this nature that are appropriate for their community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
<p>Standard 14: Cooperative Relationships Among Local, State, Provincial, Regional, National, and International I&R Providers</p> <p>Comprehensive and specialized I&R services at all geographic levels (local, state/provincial, regional, national and international) shall strive to develop formal and informal working relationships with the objective of broadening the availability of information and referral to all inquirers, facilitating access to appropriate resources regardless of their origin and/or location, avoiding duplication of effort and funding, expanding the effectiveness of social analysis with more global information about needs and services, and augmenting the impact of advocacy efforts through coordination, where possible.</p>						
		X	Local I&R services shall identify and develop cooperative working relationships with key state/provincial, national and international I&R providers. Minimum Expectation: The I&R service can demonstrate awareness of important I&R services at other levels (e.g., national runaway hotlines, Eldercare Locator) by, for example, providing a sampling of those in its database. This requirement does NOT reference I&R associations such as AIRS and its affiliates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

Action Plan/Time Estimate:

		X	National I&R services shall identify and develop cooperative working relationships with key state and local I&R programs. National and international I&R services shall identify and develop cooperative working relationships with other key national/international I&R services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 15: Participation in State or Provincial, Regional, National, and International I&R Associations
The I&R service shall strive to strengthen state or provincial, regional, national, and international I&R networks by becoming active in planning, program development, advocacy, training, and other efforts at these levels.

There are three requirements related to this Standard including the following:

		X	The I&R service shall strive to participate in the activities of its state/provincial or regional I&R association and/or the international I&R association (AIRS). Minimum Expectation: The I&R service shall participate in the activities of its state/provincial or regional I&R association and/or those of AIRS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	The I&R service shall participate in statewide or province-wide database efforts where they exist. Minimum Expectation: The I&R service must participate if there is a statewide or province-wide database effort.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	The I&R service shall participate in data collection efforts at the state or provincial, regional, national and international levels. Minimum Expectation: If there are data collection efforts at these levels, the I&R service must contribute.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--------------------------	--------------------------	--------------------------

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

Action Plan/Time Estimate:

AREA V: ORGANIZATIONAL REQUIREMENTS	The standards in Section V describe the governance and administrative structure an I&R service needs in order to carry out its mission. Included are establishing itself as a legal entity, providing for ongoing program evaluation, developing policies and procedures which guide the organization, developing an organizational code of ethics, establishing sound fiscal practices, providing a conducive physical environment, managing personnel, providing for staff training, and increasing public awareness regarding the availability of information and referral services and their value to the community.
--	--

Standard 16: Governance
The auspices under which the I&R service operates shall ensure the achievement of I&R goals and meet the stated goals of funders.

There are a number of requirements related to Governance, including the following:

	X	The I&R service shall have (or be part of an organization that has) a governing body (e.g., Board of Directors) that is constituted according to the laws of its state or province, that adequately represents the diverse interests of the community and that oversees implementation of program goals and objectives to assure quality of service. If the organization/I&R service is incorporated as a nonprofit, it shall have a constitution or bylaws that meet the appropriate legal requirements. If the agency is part of a military installation, a letter from headquarters stating responsibility for the agency's program may be substituted. If the I&R service is part of a government entity, a statement describing the authority establishing its mandate may be substituted.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	---	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

	X	If the organization/I&R service has a governing body that is not local or does not adequately represent the community it serves (e.g., an I&R service that is part of a United Way, Community Council or government agency), it shall have an advisory committee to assure sufficient local input and oversight.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	--	--------------------------	--------------------------	--------------------------

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria			Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>	

Action Plan/Time Estimate:						
	X		The organization/I&R service shall have a Mission Statement that is compatible with the purpose and philosophy of I&R.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The I&R service shall conduct regular needs assessments to keep abreast of the issues and needs of the population it serves.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The organization/I&R service shall have a process in place for examining its viability as an organization, the effectiveness of its services, its appropriate involvement in the community and its overall impact on the people it serves. The I&R service shall:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Formulate annual goals, objectives and work plans which reflect priorities for service and desired outcomes;	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Review accomplishments and actual outcomes relative to goals and objectives throughout the year and adjust service priorities, as needed; and	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria			Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>	

Action Plan/Time Estimate:						
		X	On an annual basis, conduct a structured evaluation to measure the effectiveness and cost-efficiency of its I&R service(s) and their impact on the people it serves (outcomes). The I&R service shall involve inquirers, service providers and other representatives of the community in the evaluation process; and shall modify the program in response to evaluation outcomes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
	X		The organization/I&R service shall have formally adopted, regularly reviewed, dated and formatted written policies which clearly articulate the general principles by which it manages the I&R service. Organizational policies shall be available to all employees who shall sign a compliance form.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	The organization/I&R service shall have a Code of Ethics that establishes fundamental values and professional standards of conduct for staff in their relationships with their colleagues, their employers, the people they serve, the human service professionals with whom they interact and the community as a whole. The Code of Ethics shall be approved by the governing body of the organization and included in written policies that all staff receive and agree to follow.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards		Preparation		Accreditation Criteria	Current Status		
Standards For Professional Information and Referral - Standard #	In Place When Apply	Complete During Process	Description of Accreditation Criteria		Done	In Progress	Needs Substantial Work
	X		The I&R service shall have in place a statement approved by the organization's governing body prohibiting discrimination in all of its forms and documenting its intention to comply with all laws, orders and regulations addressing this issue. The I&R service shall also have a process for registering and resolving complaints from inquirers, staff members and the community involving discrimination.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							
		X	The organization/I&R service shall have insurance coverage for personal and property liability that protects both paid employees and volunteers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							
	X		Financing shall be sufficient to enable the I&R service to provide adequate service and maintain these standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							
		X	The I&R service shall provide adequate accessible space and equipment to ensure that staff can effectively perform their duties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Plan/Time Estimate:							
Standard 17: Personnel Administration							
The I&R service shall provide a framework and mechanisms for program and personnel management and administration that guarantee the continuity and consistency required for effective service delivery.							
There are a number of requirements related to personnel administration including the following:							

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards		Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>		<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
	X		The I&R service shall have a current organization chart defining levels of authority. If the agency is part of a larger organization, it shall have a functional organization chart for the I&R service.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall have written, dated job descriptions for all staff and volunteers outlining responsibilities, essential job functions and lines of accountability.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall ensure that listings for both paid and volunteer positions are posted as broadly as possible to ensure that qualified candidates throughout the community are aware of employment opportunities.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall objectively measure each candidate's application for both paid and volunteer positions against the position's requirements using a standardized form and screening procedure.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall interview paid and volunteer candidates using written questions that are specific to the position for which they are applying and shall have an objective rating form and process for evaluating responses.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation	Accreditation Criteria			Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>	

Action Plan/Time Estimate:

		X	The I&R service shall have qualified staff who are responsible for implementing and maintaining policies of the governing body, accountable to the governing body and responsible for program management and service delivery.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

		X	The I&R service shall provide for the ongoing supervision and annual evaluation of paid employees and volunteers by qualified I&R managers. The organization shall have a written supervision plan for staff and shall develop and use standardized observation and performance appraisal forms. When performance problems are identified, they shall be documented and addressed in an individual performance improvement plan. Staff evaluations shall address specific responsibilities and job functions outlined in the individuals' job descriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

Standard 18: Staff Training
The I&R service shall have a training policy and make training available to paid and volunteer staff.

	X		The I&R service shall provide training for paid employees and volunteers which is based on pre-determined written training goals with written curriculum objectives defining behavioral outcomes for each module. The staff training program shall be responsive to the diverse learning styles of personnel including visual learners, auditory learners, and kinesthetic learners.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------	--	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate:

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
	X		The I&R service shall provide an orientation for new employees and volunteers that addresses the role, mission, and function of the I&R service; the role of the governing body; federal, state and local laws affecting service delivery (e.g., abuse reporting); and the administrative structure, policies, and procedures of the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
Training for the I&R specialists shall include:						
	X		Pre-service training appropriate to the skills of new staff so that they meet expectations in interviewing techniques and attitudes; listening skills; communication; proper telephone usage; assessment techniques; information giving and referral procedures; follow-up; data recording; maintenance of inquirer records; organization of the Taxonomy; use of the resource database; job-related equipment and tools including database software and the organization's telephone system; working with multicultural/ethnic inquirers, older adults, people with disabilities, sexual minorities, and other special populations; and techniques for handling calls from lonely, suicidal, despondent, or angry inquirers or those in crisis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
	X		On-the-job training that requires a sequential program of increasing levels of responsibility in handling inquiries (beginning with observation and ending with full responsibility for handling inquirers).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
		X	Trainees (paid employees and volunteers) shall be evaluated using objective (e.g., written tests) and subjective (e.g., observation) measures and shall demonstrate a minimum level of	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards	Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>	<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
			competency before assuming their duties. Procedures shall be in place for handling trainees who do not demonstrate competency at the required level. The I&R service shall systematically evaluate the effectiveness of its training program and the performance of its trainers and shall modify the training based on evaluation results.			
Action Plan/Time Estimate:						
		X	The I&R service shall provide in-service training focusing on refining and updating the staff's information and referral skills. Topics shall include in-house operating procedures, areas of interest in the human service field, significant changes in laws affecting the local service delivery system or requirements for the I&R service, community services, personal skill development, assistance in maintaining objective attitudes toward the inquirer's needs, and use of services or technology. In service-training shall also be available to resource specialists and management staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						
Standard 19: Promotion and Outreach The I&R service shall establish and maintain a program which increases public awareness of I&R services, their objectives, and their value to the community.						
There are a number of requirements related to promotion and outreach including the following:						
		X	The I&R service shall develop a written marketing plan which employs a systematic methodology for publicizing the agency's services to its targeted population and to other community resources (e.g., other agencies, religious organizations, police, schools). The I&R service shall use various methods to publicize information and referral. These methods shall be tailored to meet the needs of diverse populations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:						

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards		Preparation		Accreditation Criteria	Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>		<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>
		X	The I&R service shall publicize its services to special need groups in the community, such as minorities, people who speak languages other than English, people with disabilities, and rural and other isolated or underserved populations.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall encourage other community services to promote and use I&R resources.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall evaluate the efficiency and effectiveness of its marketing plan(s) through a variety of means including examination of inquirer demographic information and tabulation of referral source data.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	The I&R service shall act as a resource and offer to other organizations consultation, technical assistance, and training on available community resources.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							
		X	Staff (paid and volunteer) shall improve public relations by communicating regularly with community service providers, government officials, and planning bodies; and by participating in various community activities, e.g., community resource fairs.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan/Time Estimate:							

**Alliance of Information & Referral Systems
Accreditation Assessment Tool**

Standards		Preparation		Accreditation Criteria		Current Status		
<i>Standards For Professional Information and Referral - Standard #</i>	<i>In Place When Apply</i>	<i>Complete During Process</i>	<i>Description of Accreditation Criteria</i>			<i>Done</i>	<i>In Progress</i>	<i>Needs Substantial Work</i>

		X	The I&R service shall maintain professional relationships with local, state/provincial, regional and national organizations which provide related services.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--	----------	---	--	--	--------------------------	--------------------------	--------------------------

Action Plan/Time Estimate: