

**Michigan Alliance of
Information and Referral Systems**

***Application for MI-AIRS
Endorsement
As A 2-1-1 Call Center***

February, 2006

**Michigan Alliance of Information and Referral Systems
P.O. Box 1307
Southgate, MI
48195**

Standard I

The Call Center shall provide professional information and referral services as described in the Standards for Professional Information and Referral published by the Alliance of Information and Referral Systems (AIRS).

Requirement 1: Call Center applicants not already accredited by AIRS shall have applied to AIRS for accreditation and shall be working toward completion of the process.

Questions:

Is your information and referral program accredited by AIRS?	yes	no
Has your agency applied for accreditation by AIRS?	yes	no
If yes, When did AIRS accept your application for review?	Date:	_____
Where is your application in the process and when do you anticipate completion? (use <i>Explanation/Comments</i> box)		
Does MI-AIRS have your permission to confidentially discuss your application for accreditation with AIRS?	yes	no

Explanation/Comments:

Documentation Required: Copy of AIRS Certificate of Accreditation or copy of letter from AIRS stating that your application has been accepted for review and other correspondences related to its progress. It is the responsibility of the applicant to continue to submit to MI-AIRS copies of further correspondence with AIRS regarding accreditation.

Standard I

The Call Center shall provide professional information and referral services as described in the Standards for Professional Information and Referral published by the Alliance of Information and Referral Systems (AIRS).

Requirement 2: At a minimum, the greater of one staff person or 25% of eligible* staff shall be Certified Information & Referral Specialists (CIRS)** through the AIRS certification program to help ensure that all staff responding to caller inquiries are trained in the basic skills needed to successfully execute their duties.

Training program shall include pre-service and on-the-job training that addresses: listening skills; interviewing techniques and attitudes; communication skills; 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, minorities, and other special populations; and techniques for handling calls from lonely, suicidal, despondent, or angry inquirers or those in crisis.

Supervisory staff shall periodically monitor and evaluate the quality or service provided by call center staff.

Questions:

Are the greater of one staff person or 25% of eligible* information and referral staff certified information and referral specialists through the AIRS certification program?	yes	no	
How many eligible* information and referral specialists do you have?			_____
Please provide the number of CIRS certified staff members in your program:			_____
Does your agency conduct a formal program to train new I&R Specialists?	yes	no	
If yes, does your training program include pre-service training in basic information and referral skills?	yes	no	
Please indicate below if your pre-service training addresses the following topics. Also, identify the corresponding page number in your training manual:			
1. Interviewing techniques and attitudes	yes	no	Page# _____
2. Listening skills	yes	no	Page# _____
3. Communication	yes	no	Page# _____
4. Proper telephone usage	yes	no	Page# _____
5. Assessment techniques	yes	no	Page# _____
6. Information provision procedures	yes	no	Page# _____
7. Referral provision procedures	yes	no	Page# _____
8. Follow-up	yes	no	Page# _____
9. Data recording	yes	no	Page# _____
10. Maintenance of inquirer records	yes	no	Page# _____
11. Organization of the Taxonomy	yes	no	Page# _____
12. Use of the resource database	yes	no	Page# _____
13. Job-related equipment and tools	yes	no	Page# _____
14. Working with multicultural/ethnic inquirers	yes	no	Page# _____
15. Working with special populations	yes	no	Page# _____
16. Working with difficult inquirers	yes	no	Page# _____
17. Working with people in crisis	yes	no	Page# _____
18. Information and referral in times of disaster	yes	no	Page# _____

* Eligible refers to the AIRS definition: The candidate must be actively engaged in providing service in the field of I&R as a staff member or as a volunteer; must have a minimum of 3 years experience in I&R, and a High School diploma or GED; **or** a minimum of two years experience in I&R and an Associate of Arts degree in a human service related field; **or** a minimum of one year experience in I&R and 60 hours or more of college credit; **or** a minimum of one year experience in I&R and a bachelor's degree or higher.

** CIRS is a professional credential awarded by AIRS to individuals who meet standards for competency as community information and referral specialists.

Standard I: Requirement 2, continued

Questions, continued:

Does your I&R service provide on-the-job training?

yes no

How many training hours are involved? _____

Does your I&R Program have a written policy for conducting staff performance evaluation to ensure that I&R Specialists provide quality service?

Documentation Required: *(Not necessary to duplicate already submitted documentation.)*

Staffing table from the *Agency and Program Information* form

Copy of CIRS certificates held by current staff members – at minimum the greater of one staff person or 25% of eligible* information and referral staff

Sample orientation schedule, orientation manual, and training curriculum/material

Copy of performance evaluation policy

Standard I

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Requirement 4: The Call Center applicant shall monitor and evaluate client satisfaction and the quality of its service through follow-up with a minimum 10 percent of callers and with specific target groups.

Questions:

Does your I&R service conduct follow-up to determine:

Client satisfaction	yes	no
Quality of service	yes	no

Does your I&R service have a written follow-up policy? yes no

Does the policy mandate follow-up calls to inquirers in endangerment situations and in situations where the specialist believes that an inquirer does not have the capacity to follow through and resolve their problems? yes no

Does the policy address confidentiality of callers in endangerment situations? yes no

What is the percentage of inquiries for which follow-up is required? _____

What percentage of total inquiries was followed up last year? _____

Explanation/Comments:

Documentation: Sample of forms used by staff to document follow-up action taken and result of follow-up. Follow-up policy. Confidentiality Policy. Management reports documenting follow-up and results.

Documentation: MOU or contract with partner organization. Description of partner organization (including organization brochure and annual report). Description of partner organization qualifications and organizational capacity (including proof of accreditation (if applicable), staff certifications (if applicable), training agenda, staff development activities, and database accessibility and usage). Plans and tools used to assess the quality of service delivered by the partner organization.

Standard II

The Call Center shall be accessible by operating on a 24/7 basis,
Without assessing a direct charge against callers,
and demonstrating a commitment to reasonable accommodate callers
with special needs.

Requirement 3: The call center applicant shall provide barrier-free access to its service for individuals and groups who have special needs, e.g., TDD/TTY access for people with hearing impairments; and translation services for inquirers who speak languages other than English. If applicable, the call center must also provide for physical access for people with disabilities if the call center assists inquirers at its site.

Questions:

Does your I&R service have a TDD/TTY for communicating with people with hearing/speech impairments?	yes	no
Does your I&R service make arrangements for people who speak languages other than English? (Describe in the <i>Explanation/Comments</i> section below.)	yes	no

Explanation/Comments:

Documentation: Provide a description of languages other than English in which the call center service is available and the type of availability for each (e.g. I&R specialist(s) speak the language; use of interpreter service). Submit a facility accessibility report, if available. Otherwise provide a description of how your facility is accessible to inquirers with physical disabilities.

Standard III

The call center shall have the tools necessary to adequately support 2-1-1 service.

Requirement 1: The Call Center shall utilize a computerized resource database that contains accurate, detailed, and uniform information about community resources and is indexed using the AIRS/Info Line Taxonomy.

Questions:

Does your I&R service utilize a computerized resource database?	yes	no
Does your agency maintain the database?	yes	no
If no, what is the name and address of the organization that maintains the database?		

What is the total number of records in the database?		_____
How many new records were added in the last 12 months?		_____
How many records were updated* during the last 12 months?		_____
What is the date the taxonomy was last updated with the AIRS/Info Line Taxonomy?		_____
What software is used to operate the database?	Refer	_____
	Iris	_____
	Direct/Direct Win	_____
_____, other Commercial I&R Application		_____
	Custom I&R Application	_____
Is the database manager a participant in the MI-2-1-1 Resource Managers Work Group?	yes	no
Do records in the database follow a uniform profile?	yes	no
Does the profile include:		
A unique record identification number?	yes	no
The legal name of the organization?	yes	no
Other names by which the organization is known (popular names, former names, etc.)	yes	no
A description of the legal status of the organization? (nonprofit, for-profit, government, etc.)	yes	no
Federal Employer Identification Number (EIN)?	yes	no
Street addresses?	yes	no
Mailing addresses, where applicable?	yes	no
Telephone numbers, including TDD/TTY and fax?	yes	no
A description of services provided?	yes	no
A description of eligibility requirements?	yes	no
A description of the application process?	yes	no
The date the information was last verified?		
Does your software support the AIRS/Info Line Taxonomy by:		
Allowing users to search the Taxonomy level by level?	yes	no
Allowing users to specify that they want to search for all records indexed to a selected term and <i>all of the lower level terms on the same branch of the hierarchy</i> ?	yes	no
Allowing users to do a keyword search of Taxonomy terms?	yes	no
Does the keyword search include Taxonomy 'use' references (synonyms)	yes	no
Are records in the database accurately and consistently indexed using the AIRS/Info Line Taxonomy? ¹	yes	no
When available, are 'Facility Type' terms used?	yes	no
Is 'double indexing' (indexing using terms at multiple levels within a single branch of the hierarchy) avoided?	yes	no
Does the database management site keep their copy of the Taxonomy current by incorporating updates issued by Info Line?	yes	no

Is the database updated regularly:

Is basic contact information for all records updated at least annually?	yes	no
Is core service information for all records updated at least annually?	yes	no

Explanation/Comments:

Documentation: Sample profile of database entry. Sample database entries (such as a directory or survey document) created within the last 12 months. Printout of all terms used to index the database in code order (one copy only) generated within the 30 days of the application submittal date. A printout of the service index to the full resource database (one copy only) generated within the 30 days of the application submittal date. Written plans regarding plans to implement statements about answered as ‘no’. Written statement or policy confirming use of AIRS/Info Line *Taxonomy of Human Services*, or written plan for implementation and reasonable projected date when the conversion will be complete. Written documentation of policy/protocol for updating database records (including resource information form, agency notification procedure(s), and validation of service), updating taxonomy policy, proof of subscription to the AIRS/Info Line Taxonomy, and indexing proofing document. Copy of the agency’s inclusion/exclusion policy. Written documentation of participation in the MI 2-1-1 Resource Managers Work Group. An electronic copy of the indexed community resources database. A copy can be submitted in a browser format (the database with the software to search the database) or a web address for an internet based database. If not available, a site visit will be required at the applicant’s expense.

*Updated means that an agency in the database reviewed a copy of its record and responded with confirmation, new or corrected information.

¹ For guidelines on ‘accurate and consistent’ indexing, refer to “Indexing with the AIRS/Info Line Taxonomy of Human Services” by Margaret (Gillis) Bruni, at: http://www.airs.org/downloads/indexing_with_the_taxonomy.PDF

Standard III

The call center shall have the tools necessary to adequately support 2-1-1 service.

Requirement 2: The Call Center shall utilize a computerized system for collecting and organizing inquirer data that provides a basis for describing requests for service and identifying service gaps.

Questions:

Does your I&R service use a computerized method for recording inquirer data at the point of contact?	yes	no
Does the data collected:		
Allow identification of service requests and gaps in service by?		
ZIP Code	yes	no
Gender	yes	no
Age range	yes	no
Language used in call (Spanish, English)	yes	no
Type of service provided (information, referral, advocacy)	yes	no
Relationship to client (self, friend, professional)	yes	no
Need	yes	no
Referral(s) given	yes	no
Does the data collected record process measures including:		
Date and time of call	yes	no
Duration of call	yes	no
Who handled call	yes	no
Follow-up completed or surveyed	yes	no

Explanation/Comments:

Documentation: Written documentation the call center meets the MI 2-1-1 Operating Manual standard for recording client characteristics, service requests, referrals, unmet needs, and community assets and gaps including: Sample inquirer data collection form; sample system generated management report for service gaps; sample system generated management report for client characteristics deemed by agency needs/requirements.

Standard III

The call center shall have the tools necessary to adequately support 2-1-1 service.

Requirement 3: The Call Center shall monitor and evaluate the demand, accessibility and efficiency of the 2-1-1 service through the use of an automated call management system that is capable of measuring at minimum: call volume; call abandonment rate; average speed of answering; and average length of call.

Questions:

Does your I&R service have an automated call management system? yes no
If yes, what is the name of the system and the company that owns it?

Is the system capable of measuring:

Call volume? yes no

Call abandonment rate? yes no

Average length of call? yes no

Are reports generated from the system on a regular basis and evaluated? yes no

Explanation/Comments:

Documentation: Basic literature about call management system and features (such as a marketing brochure or preface to user guide). Sample call management system reports (reports submitted with test, not actual, call data permitted.)

Standard IV

The Call Center shall work to coordinate information and referral services in their local community and in the state of Michigan.

Requirement 1: The Call Center applicant shall demonstrate knowledge of, as well as coordination with, other community information and referral providers (such as other comprehensive I&Rs, major specialized I&Rs, crisis centers, 9-1-1 centers, and 3-1-1 centers) that operate in any part of the applicant's proposed 2-1-1 service area.

Questions:

Who are the other major community information and referral providers in your proposed 2-1-1 service area? (Attach a list that identifies the type of provider, such as: child care resource and referral; aging specialists; volunteer and donation management; disability; crisis, employment and training; and where applicable, military family service/support center. For all providers listed, please include the provider's name and corresponding contact information.)

Does your I&R service have defined working relationships with these providers? yes no
(Use the *Explanation/Comments* section below to describe relationships.)

Does your I&R service have written protocols for referring inquirers to these providers? yes no

Will your 2-1-1 Call Center be set up so that inquirers can opt to be automatically transferred to any of these providers from the main menu? yes no

If yes, which agencies will be listed on the 2-1-1's main menu of options?
(use *Explanation/Comments* box below.)

Have the relevant state-endorsed multipurpose collaborative body/bodies endorsed your agency's plan to initiate 2-1-1 services in your area? yes no

Explanation/Comments:

Documentation & Minimum Expectation: MOUs, contract, or other agreements that document cooperative working relationships with:

- Local Child Care Resource and Referral Agency
- Senior I&A/R Agency
- Crisis Intervention Program/Agency
- Military Family Centers
- Volunteer Centers
- Disability Resource Centers
- Employment & Training (One Call/One Stop Service Centers)
- Copy of MPCB Endorsement.

NOTE: When adding counties to service area, please include MOU's for each county's centers.

Standard IV

The Call Center shall work to coordinate information and referral services in their local community and in the state of Michigan.

Requirement 2: The Call Center applicant shall have developed a protocol for referring callers who want to make a community spirited contribution of money, goods or services – including volunteer hours – to agencies that coordinate volunteers and/or manage donations of money, goods or services.

Questions:

Are there agencies in your proposed 2-1-1 service area that coordinate volunteers in the community?	yes	no
Are there agencies in your proposed 2-1-1 service area that manage donations of money, goods or services?	yes	no
Does your I&R service have formal protocols for referring inquirers to these agencies?	yes	no
Will your 2-1-1 Call Center be set up so that inquirers who wish to make a donation can opt to be automatically transferred to an appropriate agency from the main menu?	yes	no

Explanation/Comments:

Documentation: MOU with local volunteer coordinating agency with relevant protocols. Protocol for handling donation requests.

Standard IV

The Call Center shall work to coordinate information and referral services in their local community and in the state of Michigan.

Requirement 3: The Call Center applicant shall conduct an ongoing program designed to increase public awareness of I&R and 2-1-1 services.

Questions:

Does your agency have a plan to increase public awareness of I&R and 2-1-1 services? If yes, what is that plan? (Summarize using the <i>Explanation/Comments</i> section below.)	yes	no
Does your agency have a budget to support I&R/2-1-1 public awareness activities? no		yes
If yes, what is the budget?	Year 1	_____
	Year 2	_____
Will your information and referral service routinely collect data about how inquirers heard about your 2-1-1 service?	yes	no

Explanation/Comments:

Documentation: Copy of marketing plan/budget. Documentation on data collection method for tracking how inquirers learned about 2-1-1 service.

Standard IV

The Call Center shall work to coordinate information and referral services in their local community and in the state of Michigan.

Requirement 4: The Call Center applicant shall strive to strengthen the seamless and uniform delivery of 2-1-1 services in Michigan by working collaboratively with all other 2-1-1 Call Centers in Michigan and other I&R providers in Michigan.

Questions:

Is your agency committed to supporting decentralized, coordinated development of a comprehensive statewide database of community resources?	yes	no
Is your agency committed to participating in efforts to develop a uniform tool for 2-1-1 centers to use to collect statistics on the number of inquiries to 2-1-1 centers, inquirer demographic/service needs, and outcomes data?	yes	no
Is your agency committed to developing support for 2-1-1 centers in adjacent service areas?	yes	no
Does your I&R participate in the Michigan 2-1-1 Collaborative	yes	no
Does your I&R participate in the Michigan 2-1-1 Resource Managers Work Group?	yes	no
Is your agency a member of AIRS?	yes	no
Is your agency a member of MI-AIRS?	yes	no

Explanation/Comments:

Documentation: If applicable, please provide documentation of your organization's involvement in the above mentioned groups.

