

STATE OF MISSOURI



Jason Kander
Secretary of State

**CORPORATION DIVISION
CERTIFICATE OF GOOD STANDING**

I, JASON KANDER, Secretary of the State of Missouri, do hereby certify that the records in my office and in my care and custody reveal that

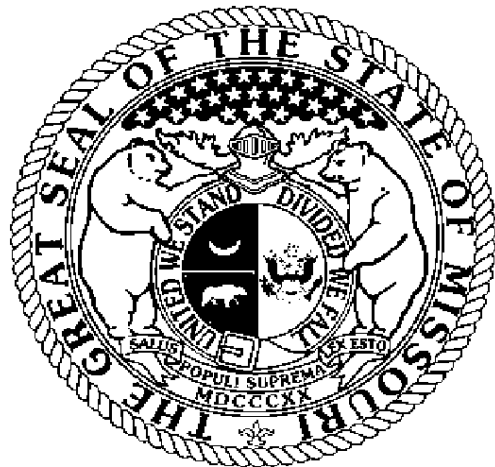
**UNITED WAY OF GREATER ST. LOUIS, INC.
N00000414**

was created under the laws of this State on the 12th day of April, 1955, and is in good standing, having fully complied with all requirements of this office.

IN TESTIMONY WHEREOF, I have set my hand and imprinted the GREAT SEAL of the State of Missouri, on this, the 3rd day of January, 2014

A handwritten signature of Jason Kander in cursive script.

Secretary of State



VERIFICATION

STATE OF MISSOURI)
COUNTY OF St. Louis City) ss.

I, Ken Graesser, being first duly sworn upon oath, do hereby depose and state that I am Chief Financial Officer for United Way of Greater St. Louis, Applicant in this proceeding; and am authorized to execute this verification; that I have read the above and foregoing reapplication and know the contents thereof; that the contents are true in substance and in fact, except as those matters which are stated upon information and belief, and as to those, I believe the same to be true.

Ken Graesser
Ken Graesser, Chief Financial Officer
United Way of Greater St. Louis

Subscribed and sworn to before me this 9th day of January, 2014.

Richard L. Skinner, II
Notary Public



RICHARD L. SKINNER, II
My Commission Expires
February 24, 2014
St. Louis City
Commission #10440022

Internal Revenue Service

Date: June 28, 2005

UNITED WAY OF GREATER ST LOUIS INC
% KENNETH A GRAESSER
910 N 11TH ST
ST LOUIS MO 63101-1018

Department of the Treasury
P. O. Box 2508
Cincinnati, OH 45201

Person to Contact:

Jamie Bowling 31-08346
Customer Service Representative

Toll Free Telephone Number:

8:30 a.m. to 5:30 p.m. ET
877-829-5500

Fax Number:

513-263-3756

Federal Identification Number:

43-0714167

Dear Sir or Madam:

This is in response to your request of June 28, 2005, regarding your organization's tax-exempt status.

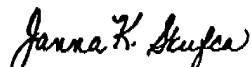
In December 1957 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Janna K. Skufca, Director, TE/GE
Customer Account Services

AIRS STANDARDS AND QUALITY INDICATORS FOR PROFESSIONAL INFORMATION AND REFERRAL



**Version 7.0
Revised March 2013**



**Published by:
Alliance of Information and Referral Systems**

The Alliance of Information and Referral Systems (AIRS) is a membership organization whose mission is "***To provide leadership and support to its members and Affiliates to advance the capacity of a Standards-driven Information and Referral industry that brings people and services together.***"

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TABLE OF CONTENTS

ACKNOWLEDGMENTS	iv
PREFACE	v
INTRODUCTION.....	vii
STANDARDS REVISION PROCESS	x
AIRS STANDARDS AND QUALITY INDICATORS.....	1
SERVICE DELIVERY.....	1
Standard 1: Assessment and Referral Provision	1
Standard 2: Information Provision	4
Standard 3: Methods of Access to Community Resource Information.....	4
Standard 4: Inquirer Advocacy	6
Standard 5: Crisis Intervention	6
Standard 6: Follow-Up.....	8
RESOURCE DATABASE.....	10
Standard 7: Inclusion/Exclusion Criteria	10
Standard 8: Data Elements	11
Standard 9: Classification System/Taxonomy	13
Standard 10: Content Management and Indexing	14
Standard 11: Database Search Methods.....	16
Standard 12: Database Maintenance	17
REPORTS AND MEASURES	19
Standard 13: Inquirer Data Collection.....	19
Standard 14: Inquirer Data Analysis and Reporting.....	21
COOPERATIVE RELATIONSHIPS.....	22
Standard 15: Cooperative Relationships Within the I&R System.....	22
Standard 16: Cooperative Relationships With Service Providers	24
DISASTER PREPAREDNESS.....	24
Standard 17: Emergency Operations and Business Contingency Plan	25
Standard 18: Formal Relationships with Government and Private Sector Emergency Operations and Relief Agencies	26
Standard 19: Disaster Resources	27
Standard 20: Disaster-Related I&R Service Delivery.....	28
Standard 21: Disaster-Related Inquirer Data Collection/Reports.....	29
Standard 22: Disaster-Related Technology Requirements.....	29
Standard 23: Disaster Training and Exercise	31
ORGANIZATIONAL EFFECTIVENESS	32
Standard 24: Governance	32
Standard 25: Technology	34
Standard 26: Personnel Administration	35
Standard 27: Staff Training.....	38
Standard 28: Promotion and Outreach	40
Standard 29: Program Evaluation and Quality Assurance.....	41
GLOSSARY OF TERMS.....	43
INDEX	82

ACKNOWLEDGMENTS

AIRS would like to thank members of the AIRS Standards Committee, under the leadership of chair Bob McKown, for developing the 7th edition of the *Standards and Quality Indicators for Professional Information and Referral*. As with previous editions, Georgia Sales of 211 LA County provided primary authorship and edited the many comments and suggestions that were submitted during the revision process.

AIRS also extends special thanks to members of the technology work group who reviewed the entire document and suggested a number of technology-related improvements including the new Technology Standard; to our national partners who responded to our request for feedback; and to individual I&R professionals who took the time to review the draft and provide comments. The final product is all the better for your efforts.

AIRS Board members, staff and other experts who participated in the Standards review and update of this 7th edition include:

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Thanks also go to Michael Hamm of Michael Hamm & Associates for his invaluable advice. His book, *The Fundamentals of Accreditation*, provided the foundation for our credentialing programs.

PREFACE

The Standards Committee is pleased to release the 7th edition of the *AIRS Standards and Quality Indicators for Professional Information and Referral*. As the field of information and referral (I&R) has evolved and expanded, the standards have changed to reflect the current realities, practices and needs of the I&R field. The standards serve as an important foundation for both new and existing I&R services and, from the beginning (1973), have formed the basis of two very important credentialing programs: individual certification and agency accreditation.

As with previous editions, these standards further promote the AIRS mission which is *“To provide leadership and support to our membership and affiliates to advance the capacity of a Standards-driven Information and Referral industry that brings people and services together.”*

The Standards Committee continued the use of Quality Indicators. The indicators are ideals that add clarity and provide a framework for determining the degree of adherence to the standards and achievement of quality goals. Many of the quality indicators have been adopted as requirements for AIRS Accreditation and, in that context, represent practices that need to be in place to measure the level of quality being achieved by the I&R service.

With a growing number of people in our communities preferring methods of communication that were unavailable a decade ago, technology has become increasingly integral to I&R services and, with that change, the need for new standards. A workgroup was commissioned by the Standards Committee to review the entire Standards document from that perspective. They recommended the addition of a new technology standard to the Organizational Effectiveness section and changes to other areas of the standards impacted by emerging communication options. The Standards, as a whole, now better reflect the tools we use to communicate with and serve our inquirers. The Committee also thoughtfully considered recommendations from the AIRS Accreditation Commission, feedback from AIRS national partners and suggestions by others who read and responded to the final draft.

The Committee has worked to make these standards fair and reasonable, not overly burdensome, clear and easy to understand, non-discriminatory and applicable to multiple models of practice. The committee has also ensured that the standards reflect the growth of the field and stretch us toward meeting the needs of inquirers and our communities. And, very importantly, the process has included many opportunities for review, discussion and input by the field. The standards are based on the Basic Principles of I&R (also known as the I&R Bill of Rights) which states:

An I&R service:

- ✓ Maintains accurate, comprehensive, unbiased information about the health and human services available in their community.
- ✓ Provides confidential and/or anonymous access to information.

- ✓ Provides assessment and assistance based on the inquirer's need(s).
- ✓ Provides barrier-free access to information.
- ✓ Recognizes the inquirer's right to self-determination.
- ✓ Provides an appropriate level of support in obtaining services.
- ✓ Ensures that inquirers are empowered to the extent possible.
- ✓ Ensures that inquirers have the opportunity to access the most appropriate I&R service available in the system.

The AIRS Standards Committee is proud to provide this edition for use by all those individuals and organizations in the field of I&R who seek to ensure that information and referral services are broadly available and effectively delivered.

INTRODUCTION

Many people experience events in their lives that place them in a position where they need help with emergency food or shelter, legal or financial assistance, affordable health care or other essential services. Whether the individual is well-educated or a high school dropout, financially secure or living in poverty, a long-time resident or a runaway new to a city, a staff person new to human services searching for resources for a client or a seasoned veteran confounded by changes in the service delivery landscape, negotiating the maze of human service providers can be a daunting challenge. Those who are most fortunate find their way to an information and referral (I&R) service and, through that gateway, to the help they need.

I&R programs help individuals, families and communities identify, understand and effectively use the programs that are part of the human service delivery system. At the community level, I&R services facilitate long-range planning by tracking requests for service and identifying gaps and duplications in services. I&R services also work with other human services organizations to make them a more effective resource for their clients. Professional I&R specialists help people better understand their problems and make informed decisions about possible solutions. Specialists may advocate on behalf of those who need special support, and reinforce the individual's capacity for self-reliance and self-determination through education, affirmation, collaborative planning and problem solving. I&R services are a vital link bringing people and services together.

The purpose of the AIRS Standards is to establish reference points that define expected practices within the field and provide guidelines that communities or other jurisdictions can use when they develop an I&R program to meet the needs of their people. The Standards are the foundation for AIRS Accreditation and provide an organizational context for certification of I&R and resource specialists through the AIRS Certified Information and Referral Specialist (CIRS), Certified Resource Specialist (CRS) and Certified Information and Referral Specialist Aging (CIRS-A) programs. They include fundamental requirements for all I&R services that want to be accredited as well as recommendations regarding further enhancements of I&R operations for organizations currently positioned to implement them. Whether the I&R service is national or local in scope, comprehensive or specialized in nature, or offered in nonprofit, for-profit or government settings, these standards serve as indicators of service quality and effectiveness, aid in the development of new I&R services and can be used to upgrade established services.

The Standards address all aspects of an I&R operation. They define the information and referral process in concrete terms; establish criteria for database development; mandate support for community planning activities; incorporate a broad view of collaboration at the local, state or provincial, regional and national levels; include provisions for the socially responsible use of technology; and describe the role of information and referral services in times of disaster.

Of particular importance is the vision of information and referral as a coordinated system of service delivery that encourages cooperation, collaboration and responsible use of limited resources, a trend that began in the 1980s and intensified in the 1990s with the advent of the Internet and the ability to share electronic databases. Section IV of the Standards, "Cooperative Relationships," assigns to each I&R service the further responsibility of building or participating in an existing information and referral system to more effectively serve the community. It also addresses cooperation between and among national, regional, state or provincial and local I&R services; and development of cooperative working relationships within the local service delivery system.

The Standards will be more applicable and relevant if the distinction between an I&R service and an I&R system is understood. An I&R service can be a public or private, for-profit or nonprofit organization. It also can be a clearly identifiable, administratively separate unit within a larger organization. I&R providers include private, nonprofit agencies; United Ways; Voluntary Action Centers; libraries; city, county and state or provincial offices; military Family Service/Support Centers; Area Agencies on Aging; child care resource and referral services; health care institutions and employee assistance programs.

The individual I&R service is the basic unit of the I&R system and each I&R service is part of the system. The system generally serves an area that is considered a logically defined community but may be broader in geographic scope. In a rural area, it may consist of only a few organizations that provide information and referral. In a metropolitan area, it may include a diverse array of organizations, some of which may supply a very specialized type of I&R service (e.g., for people with disabilities or older adults), while others may provide a comprehensive range of assistance. The coordination of all I&R services and programs within a community and beyond constitutes the I&R system.

The Standards, when applied to an I&R system, treat each I&R service as part of the larger system. They outline each of the elements necessary for development of the system with the intent that every service will ensure that each of these elements (a resource database, data collection, data analysis, and provision of I&R services) is available to the community in a coordinated and integrated manner. The individual I&R service, however, may not be responsible for providing all program elements. The requirements in the Standards may be met by the I&R service itself, by its parent if part of a larger organization or, for some functions, by the broader I&R system. For example, one I&R service might maintain the resource database that is used by all of the other I&R programs in the community, while another might provide 24-hour backup coverage for other I&R organizations that provide live answer only during working hours, and yet another might be part of a larger organization that handles finances, personnel matters and emergency procedures for all of its departments and programs.

The overall goal of I&R services and I&R systems is to deliver information that is needed to link inquirers with available and appropriate resources without duplication of effort. This vision of service delivery involves collaboration in maintaining a resource database and a common Taxonomy customization; collecting, analyzing and reporting inquirer data; training I&R staff and others in the community; promoting the I&R system

and each individual I&R service that is a part of the system; ensuring broad access to I&R services; providing information and referral to inquirers; providing advocacy, as needed; and following up with inquirers when required.

I&R professionals, paraprofessionals and volunteers are encouraged to refer to this document and identify work roles and responsibilities and quality indicators. Boards and advisory committees are encouraged to develop long-range plans for service operation, promotion and evaluation based on the AIRS Standards. Funding sources may find that the Standards provide valuable background material for making decisions.

An I&R service that operates in accordance with the AIRS Standards ensures that a high quality of service is being provided to their community.

STANDARDS REVISION PROCESS

Adopted October 2004

Revised March 2013

AIRS has a process for regularly reviewing and revising the *Standards and Quality Indicators for Professional Information and Referral* including the Standards themselves, associated quality indicators and interpretations of the Standards as reflected in the accreditation process and certification tests.

A full review will be conducted at least every three years. The Standards Committee will convene a review team with representatives from the field with expertise.

There are a number of different types of changes that may be needed. These include:

- ✓ Modifications in the wording of the Standards or associated quality indicators to add clarity. The need for this type of update arises most frequently through difficulties I&R services may have during the Accreditation process.
- ✓ Elaboration on quality indicators already present in the Standards but currently in more general form.
- ✓ Addition of Standards that represent elevation of requirements already present as quality indicators. Sometimes a practice currently only mentioned at the quality indicator level is important enough that it needs to be a Standard in its own right with its own associated quality indicators.
- ✓ Addition of Standards not currently referenced in the document.

It should be recognized that changes to standards, accreditation, and certification each have an impact on the others and should be addressed in regular cycles to ensure that they remain in sync.

The AIRS Standards Committee and the AIRS Accreditation Commission recommend the following review process:

1. The Standards Committee will discuss the proposed addition, modification or deletion and determine whether and how to proceed. Criteria for making additions and changes to the Standards include the following:
 - ✓ Standards should reflect current I&R practices. If a new service delivery standard relating to a particular type of call is being proposed, for example, are these types of calls being handled by a significant number of I&R services?
 - ✓ Standards should be no more burdensome that they need to be in order to ensure the desired outcome. We do not want to set the bar so high that only a few I&R services will be able to implement a Standard when a lesser requirement still constitutes quality service.

- ✓ Standards should improve the quality and consistency of I&R services provided to individuals, families and communities.
 - ✓ Standards should support long-term service sustainability through improved governance, community collaborations and operational efficiencies.
 - ✓ Standards should embrace all appropriate models of practice rather than limiting compliance to a single model. AIRS must support creative alternatives that achieve the desired outcome of quality performance.
 - ✓ Standards should be achievable by all I&R service providers.
 - ✓ Standards should be written in a form that is clear and easy to understand.
2. If the decision regarding a proposed modification is to proceed, the Standards Committee will determine whether the change is simple enough to draft without additional input (e.g., a modification in wording) or whether expert advice is needed when developing a draft. If necessary, the Committee will designate a working group to draft the changed/new Standard and associated quality indicators.
 3. The Committee will review the draft and suggest changes/additions. If experts were not involved in the drafting process, the Committee may ask for an expert review before finalizing the draft. If the decision is to deny the request, an explanation will be provided to the individual/committee originating the suggestion and a discussion regarding the decision can be held, if necessary.
 4. The Committee will share a draft of the Standards with the full Board for comment. An interim review by the Executive Committee may be conducted at their request.
 5. If a new Standard or a major change is being considered, the draft will be posted for review by the field. It is important for AIRS to make every possible attempt to get maximum input into the development process. Mechanisms may include:
 - ✓ Distribution via the AIRS Networker.
 - ✓ Distribution via the 2-1-1 Discussion Group.
 - ✓ Distribution to the AIRS Affiliates.
 - ✓ Mailing to members.
 - ✓ Article in the newsletter.
 - ✓ Posting on the AIRS website.
 - ✓ Discussion forums at AIRS and Affiliate conferences.
 - ✓ Consultation with organizational partners.
 6. Incorporate feedback, finalize the changed/new Standard and update the Standards document to reflect the new material.
 7. Ensure that technical assistance on the competencies or other elements associated with the new requirement is made available to the field in conjunction with the adoption of the new Standard.
 8. Provide ample opportunity for implementation by I&R services.

9. The AIRS Accreditation Commission and the AIRS Certification Commission should assess any changes in the Standards for relevance to their credentialing programs. If there has been an implementation period, the new Standard can become a requirement immediately. If not, applicant organizations can initially be required to have a plan in place for implementation. Full implementation can become a requirement further down the road.

AIRS STANDARDS AND QUALITY INDICATORS

SERVICE DELIVERY

The Service Delivery standards describe the functions that are essential for providing information and referral and assuring access for all, including an individual assessment of need; clarification of the situation; information and/or referrals, as required; crisis intervention and advocacy, when warranted; and follow-up, as necessary. The I&R service recognizes the inquirer's right to accurate, comprehensive and unbiased information provided in a confidential and/or anonymous, nonjudgmental manner; and is a non-partisan, non-ideological and impartial information source for available nonprofit, government and for-profit services that meet the I&R service's inclusion/exclusion criteria. Service is provided by trained I&R specialists and is delivered in a variety of practical ways that support the mission of the I&R program, the accessibility requirements of the community and the communication preferences of inquirers (for example, a combination of telephone, in-person, email, instant messaging (IM), text/SMS messaging, online chat, video relay/chat, responses to voicemails, social media and other methods of communication). Although the medium of service delivery may affect the nature of the interaction with inquirers, the essential elements of the I&R process remain the same.

Standard 1: Assessment and Referral Provision

The I&R service conducts an assessment in which the inquirer has one-to-one interaction with an I&R specialist. The assessment process consists of active listening and effective questioning to determine the needs of the inquirer, clarifying the need, identifying appropriate resources, selecting appropriate delivery mode(s), making referrals to organizations capable of meeting those needs, and providing enough information about each organization to help inquirers make an informed choice. In situations where services are unavailable, the I&R service engages in problem solving to help the inquirer identify alternative strategies.

Quality Indicators

1. The I&R service ensures through training and supervision that I&R specialists:
 - ✓ Identify themselves and their program per agency guidelines;
 - ✓ Establish rapport with the inquirer and use active listening skills and empathy to discern the presenting problem;
 - ✓ Respond to each inquirer in a professional, nonjudgmental, culturally appropriate and timely manner;
 - ✓ Use jargon-free language and an appropriate tone of voice and inflection to convey empathy and engagement with the inquirer's situation;

- ✓ Make an accurate assessment of the inquirer's problems and needs asking relevant questions to elicit information necessary for an accurate referral;
 - ✓ Explore whether there are specific preferences or requirements such as language needs, evening or weekend hours, low cost services, or disability access;
 - ✓ Clarify and confirm the inquirer's need(s) using techniques such as paraphrasing before providing referrals;
 - ✓ Present the inquirer with various approaches to addressing the problem that give them a range of options;
 - ✓ Explore the inquirer's own resources (e.g., friends, family, faith-based community);
 - ✓ Effectively use the resource information system to identify resources to meet the inquirer's needs;
 - ✓ Where possible and practical, provide at least three referrals to give the inquirer a choice (and to protect the I&R service from being perceived as making a "recommendation") while being careful not to overwhelm the inquirer with too many options;
 - ✓ Suggest ways the inquirer can advocate for him or herself, when appropriate (empowerment);
 - ✓ If demographic information is being collected that is not directly relevant to the assessment, e.g., if required by contract or to enhance community reports, provide an explanation to the inquirer about why the information is needed;
 - ✓ Encourage inquirers to call back if the information proves incorrect, inappropriate, or insufficient to link them with the needed service(s); and
 - ✓ Accurately record the disposition of the inquiry as well as the problems and needs that were addressed for use in reports.
2. The I&R service provides barrier-free access to its services for individuals and groups who have special needs, e.g., access via applicable technology and/or communication methods for people with hearing or speech impairments; language access for inquirers who speak languages other than English; and access for people with disabilities if the I&R service assists inquirers at its facility.
 3. The I&R service ensures that staffing is structured to meet the needs of callers, i.e., that the optimum number of staff are available at the times most inquiries occur.
 4. The I&R service makes every effort to ensure that its service is accessible from all telecommunications devices and mechanisms within its coverage area.
 5. The I&R service provides, or ensures through coordination with other I&R providers, that information and referral through live answer is available to the community 24 hours per day, year round.

6. I&R services that have a formal, written agreement with another organization to provide after-hours or overflow coverage ensure that the organization meets all AIRS Service Delivery and Resource Database standards and quality indicators.
7. If the I&R service provides access via email, instant messaging (IM), text/SMS messaging, online chat, video relay/chat, responses to voicemail contacts, social media or other alternative access methods, it has defined guidelines regarding the timeliness for response.
8. The I&R service is thorough and diligent in providing effective information, assessment and referral to inquirers with a high quality experience as a priority. During each transaction, I&R specialists weigh the time they need to meet each inquirer's needs while conscious of the overall productivity goals for the organization. When handling transactions via IM/chat, text/SMS messaging or other forms of social media that lend themselves to multitasking, they understand the types of situations that require their undivided attention and handle simultaneous contacts (e.g., two live chats) only in appropriate circumstances.
9. The I&R service provides its core telephone service at no cost to the inquirer other than through the methods by which normal phone coverage is purchased (e.g., cell phone minutes, landline fees, pay phone charges). Toll-free access is provided to people living within the area served by the I&R.
10. The I&R service has a policy to ensure the privacy, confidentiality and security of personal inquirer information; and has agreement forms that staff and others with access to confidential information sign to document their compliance. Identifying information about inquirers, their requests and the information given to them are not communicated to others unless:
 - ✓ Release of information is required by law or court order;
 - ✓ Careful consideration indicates the presence or risk of serious harm to the inquirer or another person, and then communication may be only to those who must be informed in order to reduce harm or risk; or
 - ✓ The inquirer has given explicit permission for the information to be disclosed to another person or agency. The inquirer specifies what information may be given and to whom.
11. The I&R service has procedures for managing challenging inquirers that recognize the right of inquirers to access, respect, privacy, confidentiality and treatment that is professional, nonjudgmental and culturally appropriate while protecting the I&R service from an unreasonable level of offensive behavior. The procedures define inquirer behaviors that are potentially offensive; describe acceptable options for managing contacts that are disruptive and criteria for implementation; and mandate review of actions taken regarding specific individuals on a regular basis to determine if a change is required.

12. The I&R service has a process to field and resolve complaints about inquirer privacy and confidentiality, provides training and ensures that related policies and procedures are in place.

Standard 2: Information Provision

The I&R service provides 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 a detailed description of community service systems (such as explaining how intake works in a particular discipline such as substance abuse services), agency policies and procedures for application. Active listening is necessary to establish a positive contact with the inquirer, understand context and provide an appropriate response.

Quality Indicators

1. The I&R service clarifies the inquirer's initial request for information as there may be an underlying or unstated problem.
2. Information is accurate and pertinent to the request of the inquirer.
3. The I&R service encourages re-contact by the inquirer if the initial information proves to be incorrect, inappropriate or insufficient to link the individual with needed services.
4. The I&R service accurately records the nature (disposition) of the inquiry, the problems/needs addressed by the inquiry if confirmed and, if applicable, the organization discussed in the course of the inquiry, for use in reports.

Standard 3: Methods of Access to Community Resource Information

The I&R service provides community resource information in a variety of ways including supported access through an I&R specialist and independent access which allows end users to conduct their own searches without speaking to an I&R specialist or other professional.

Quality Indicators

1. Supported Access Methods: The I&R service makes its information and/or services available by:
 - ✓ Telephone.

In addition, the I&R service may make information and/or services available by:

- ✓ Email, instant messaging (IM), text/SMS messaging, online chat, video relay/chat, voicemail contact responses, social media or other methods of communication.
- ✓ An in-person presence at community facilities.

2. Independent Access Methods: The I&R service also makes its information and/or services available by:

- ✓ Making all or a portion of its database available on the Internet at no cost and in a format that allows searching by:
 - Organization and program name.
 - Taxonomy and/or Taxonomy related keywords.
 - Geographic location.Service searches are structured to allow the public to use natural language; and options such as user defined categories, hot topics lists and other “user friendly” search strategies are employed, where possible. Database record displays provide all of the contextual information needed for the inquirer to make an informed choice.

In addition, the I&R service may:

- ✓ Compile and distribute a directory of services in print or electronic format.
 - ✓ Make copies of its database available to other organizations that provide information and/or referrals.
 - ✓ Use social media and other communication tools to inform the public about significant changes to key services and important access issues.
 - ✓ Provide menu-driven recorded voice information about key resources and community information.
 - ✓ Make its information about community resources available through community-based kiosks or other similar gateways.
- 3.** If the I&R service provides mechanisms for independent access, it includes information about how to connect with an I&R specialist if consultation and guidance are required (for example, the ability to press “0” at any time when listening to a recorded message or to engage in instant messaging (IM) when searching for resources on a website).
- 4.** The principles of confidentiality remain applicable in cases involving independent access. In situations where online information can be gathered, relevant legislation is observed and information about individual activities is only made available in aggregate form. Privacy policies are clearly displayed and reflect the general trends in “cyberethics”.