



*Serving Nevada, Placer, Sacramento, Sierra, Sutter, Yolo & Yuba Counties*

## **AREA 4 AGENCY ON AGING**

### I&A Tracking System:

Document: I&A National Standards Form 2007

The Standards serve as indicators of service quality and effectiveness, aid in the development of new I&R/A services and can be used to upgrade established services. The primary purpose for use of this evaluation tool is:

1. To evaluate a provider's capacity to meet the bottom line requirements for all I&R/A services,
2. To document any potential enhancements for I&R/A operations currently positioned to implement them,
3. To encourage consistency among I&R/A programs,
4. To measure progress toward individual program goals, and
5. To assist in developing future training and technical assistance activities for staff and volunteers.



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**Area 4 Agency on Aging**

Information & Assistance Program

**Standards for Professional I&R  
Program Evaluation Tool  
2007**

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2. To document any potential enhancements for I&R/A operations currently positioned to implement them,
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*Please refer to the AIRS Standards For Professional Information and Referral, Version 5.1 for detailed descriptions of each Standard listed below. The Standards can be downloaded at [www.airs.org](http://www.airs.org)*



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**Instructions:** Use tab key or mouse to move cursor into position. To check boxes, left-click your mouse.

**Note:** Information & Referral (I&R) and Information & Assistance (I&A) are used interchangeably.

| I. SERVICE DELIVERY  | Check One   | Provider Comments | A4AA Notes |
|--|---|-------------------|------------|
| <p><b><u>Standard 1: Information Provision</u></b></p> <p>The program provides information to an inquirer in response to a direct request for such information. Information can range from a limited response (i.e., organization's name, phone number) to detailed data about community service systems (i.e., explaining how a group intake system works), agency policies, and procedures for application.</p>  | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                   |            |
| <p><b><u>Standard 2: Referral Provision</u></b></p> <p>The program provides information and referral services in which the inquirer has one-to-one, human contact with an I&amp;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</p> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                   |            |



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| services are unavailable by locating alternative resources, and, when necessary, actively participating in linking the inquirer to needed services.  |   |                          |                   |
| <p><b><u>Standard 3: Advocacy/Intervention</u></b></p> <p>The program offers advocacy, when necessary, 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.</p>  | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |
| <p><b><u>Standard 4: Crisis Intervention</u></b></p> <p>Program staff are prepared to assess and meet the immediate, short-term needs of inquirers who are experiencing a crisis. Included is assistance for individuals threatening suicide, homicide or assault; victims of domestic abuse or other forms of violence, elder/dependent adult abuse/neglect; people experiencing a psychiatric emergency; and others in distress.</p> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |
| <p><b><u>Standard 5: Follow-Up</u></b></p> <p>The program maintains a written policy which addresses the conditions under which follow-up must be conducted.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |
| <b>II. RESOURCE DATABASE</b>   | <b>Check One</b>  | <b>Provider Comments</b> | <b>A4AA Notes</b> |



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| <p><b><u>Standard 6: Inclusion/Exclusion Criteria</u></b></p> <p>The program maintains written criteria for the inclusion or exclusion of agencies and programs in the resource database. These criteria are uniformly applied and published so that staff and the public is aware of the scope and limitations of the database.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |
| <p><b><u>Standard 7: Data Elements</u></b></p> <p>A standardized profile is used for each organization that is part of the local community service delivery system or other geographic area or service sector covered by the I&amp;R service.</p>  | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |
| <p><b><u>Standard 8: Classification System</u></b></p> <p>A standard service classification system is used 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.</p> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |
| <p><b><u>Standard 9: Indexing the Resource Database/Search Methods</u></b></p> <p>Information in the resource database is indexed and accessible in ways that support the I&amp;R process.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |



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| <p><b><u>Standard 10: Database Maintenance</u></b></p> <p>The resource database is 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.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                                 |                          |
| <p><b>III. REPORTS AND MEASURES</b></p>  | <p><b>Check One</b></p>                                     | <p><b>Provider Comments</b></p> | <p><b>A4AA Notes</b></p> |
| <p><b><u>Standard 11: Inquirer Data Collection</u></b></p> <p>A computerized system has been established and utilized 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.</p> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                                 |                          |
| <p><b><u>Standard 12: Data Analysis &amp; Reporting</u></b></p> <p>Reports using inquirer data and/or data from the resource database are utilized to support community planning activities (or planning at other levels), internal analysis and advocacy.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                                 |                          |



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| IV. COOPERATIVE RELATIONSHIPS  | Check One   | Provider Comments | A4AA Notes |
|--|---|-------------------|------------|
| <p><b><u>Standard 13: Cooperative Relationships within the Local I&amp;R System</u></b></p> <p>In communities which have a multiplicity of comprehensive and specialized I&amp;R providers, the I&amp;R service has developed cooperative working relationships to build a coordinated I&amp;R system which ensures broad access to information and referral services, maximizes the utilization of existing I&amp;R resources, avoids duplication of effort and encourages seamless access to community resource information.</p> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                   |            |
| <p><b><u>Standard 14: Cooperative Relationships within the Local Service Delivery System</u></b></p> <p>The I&amp;R service strives 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.</p>       | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                   |            |



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| <p><b><u>Standard 15: Cooperative Relationships Among Local, State or Provincial, Regional, National, and International I&amp;R Providers</u></b></p> <p>The provider strives 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> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                                 |                          |
| <p><b><u>Standard 16: Participation in State or Provincial, Regional, National, and International I&amp;R Associations</u></b></p> <p>The provider strives to strengthen state or provincial, regional, national, and international I&amp;R networks by becoming active in planning, program development, advocacy, training, and other efforts at these levels.</p>  | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                                 |                          |
| <p><b>V. ORGANIZATIONAL REQUIREMENTS</b></p>  | <p><b>Check One</b></p>                                     | <p><b>Provider Comments</b></p> | <p><b>A4AA Notes</b></p> |
| <p><b><u>Standard 17: Governance</u></b></p> <p>The auspices under which the I&amp;R operates ensures the achievement of I&amp;R goals and meets the stated</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                                 |                          |



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| goals of the funding agency.   |   |                          |                   |
| <b><u>Standard 18: Personnel Administration</u></b><br>The I&R service provides a framework and mechanism for program and personnel management and administration that guarantees the continuity and consistency required for effective service delivery.                          | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |
| <b><u>Standard 19: Staff Training</u></b><br>The I&R service utilizes a training policy and makes training available to paid and volunteer staff.  | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |
| <b><u>Standard 20: Promotion and Outreach</u></b><br>The I&R service has established and maintains a program which increases public awareness of I&R services, their objectives, and their value to the community.   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |
| <b>VI. DISASTER PREPAREDNESS</b>   | <b>Check One</b>  | <b>Provider Comments</b> | <b>A4AA Notes</b> |
| <b><u>Standard 21: Emergency Operations and Business Contingency Plan</u></b><br>The I&R service has a written emergency operations and business contingency plan that specifically addresses disasters common to the area, but one that also prepares for emergencies in general. | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |                          |                   |



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| <p><b><u>Standard 22: Formal Relationships with Government and Private Sector Emergency Operations and Relief Agencies</u></b></p> <p>The I&amp;R service participates in ongoing cooperative disaster response planning in the community and takes all steps that are necessary to become recognized as an integral part of the community's emergency preparedness and response network.</p> | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |
| <p><b><u>Standard 23: Pre- and Post-Disaster Database</u></b></p> <p>The I&amp;R service has developed, maintains, and/or uses an accurate, up-to-date computerized resource database that contains information about available community resources that provide services in times of disaster.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |
| <p><b><u>Standard 24: Disaster-Related I&amp;R Service Delivery</u></b></p> <p>The I&amp;R service has the ability to provide information and referral services to the community during (when appropriate) and following a disaster or other emergency.</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |
| <p><b><u>Standard 25: Disaster-Related Inquirer Data Collection/Reports</u></b></p> <p>The I&amp;R service tracks inquirer requests for service, referrals and when appropriate, demographic information about the inquirer; and is prepared to</p>   | <input type="checkbox"/> Yes <input type="checkbox"/><br>No |  |  |



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| <p>produce reports regarding requests for disaster-related services and referral activity.</p>   |  |  |  |
| <p><b><u>Standard 26: Disaster-Related Technology Requirements</u></b><br/>         The I&amp;R service has technology in place that facilitates the ability of the organization to maintain service delivery during times of disaster or a localized emergency.</p>   | <p><input type="checkbox"/> Yes <input type="checkbox"/><br/>         No</p> |  |  |
| <p><b><u>Standard 27: Disaster Training and Exercise</u></b><br/>         The I&amp;R service trains staff on emergency operations and business expectations upon hiring and provides ongoing training at least annually thereafter. The I&amp;R service actively participates in community disaster exercises to test the organization's emergency operations plan.</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/><br/>         No</p> |  |  |