



## POLICY AND PROCEDURE MANUAL

**SECTION: Information Services**

**POLICY: IS 01**

**DATE:** April 2025

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August 2022, January 2020; September 2016; April 2013

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### INFORMATION SERVICES STANDARDS

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#### **PREAMBLE**

Contact Brant manages the Community Information Brant, Haldimand, and Norfolk website and has a service agreement with 211 Ontario for the use of the majority of records in the database. Contact Brant's Information Services policies and procedures are based on the InformUSA standards and 211 Ontario Corporation directives and recognize Contact Brant's mandate to provide information as a single point of access agency. Contact Brant utilizes the CIOC software for this Database.

'I&R' refers to Information and Referral. The InformUSA resource, *The I&R Training Manual – An Introduction to Information and Referral*, is a resource for Database standards and summarizes the role of Contact Brant as a data provider/manager of the Database:

"I&R organizations create and maintain databases of human services and make that information available to individuals and communities through a variety of communication channels. These databases contain a detailed description of the programs and services provided by community, social, health and relevant government organizations. The information is searchable using a variety of criteria, and the programs are indexed according to a hierarchical classification system."

The InformUSA standards are based on the Basic Principles of Information and Referral, also known as the I&R Bill of Rights (*InformUSA Standards for Professional Information & Referral and Quality Indicators, 2009*):

- The I&R service maintains accurate, comprehensive, unbiased information about the health and human services available in its community.
- The I&R service provides confidential and/or anonymous access to information.
- The I&R service provides assessment and assistance based on the inquirer's need(s).
- The I&R service provides barrier-free access to information.
- The I&R service recognizes the inquirer's right to self-determination.
- The I&R service provides an appropriate level of support in obtaining services.
- The I&R service assures that inquirers are empowered to the extent possible.
- The I&R service assures that inquirers can access the most appropriate I&R service available in the system.

InformUSA relevant definitions of I&R for this Information Services Policy include:

- |                                   |   |
|-----------------------------------|---|
| - Resource Database               | - Data collection, analysis and reporting |
| - Cooperative program development | - Community outreach.                     |

## **POLICY**

**Contact Brant will maintain a web-based Database of accurate, comprehensive, unbiased information about community, social, health and government programs and services available in Brant, Haldimand and Norfolk.**

## **PROCEDURES**

1. All employees will ensure that up-to-date information on community, social, health, and government programs and services available in Brant, Haldimand, and Norfolk is included in the Community Information Brant, Haldimand, Norfolk Database.
  - a. Contact Brant staff will work with the other human service providers within the community to promote accurate information on their programs within the resource Database.
2. As Contact Brant is a data partner for 211 Ontario, all employees will act in a reasonable manner to contribute to the successful implementation of 211 Services across Ontario, including but not limited to their web-based service and 211 phone service.
3. Contact Brant will conform to the standards established by InformUSA for an Information and Referral Resource Database, unless otherwise established by InformCanada or requested 211 Services Corporation
  - a. Have personnel who are InformUSA Certified, or in the process of receiving certification, managing the Database (Certified Community Resource Specialist, and Certified Community Resource Specialist Database Curator)
  - b. Meet contractual obligations established by Ontario 211 for Data Providers, including the 211 Inclusion and Exclusion Policy and targets.
  - c. Data classification using the bilingual 211 HSIS *Taxonomy*.
4. The Lead Community Navigator and other assigned staff will manage the Community Information records, including researching, collecting, aggregating, organizing, updating and seeking continual improvement of information based on inclusion criteria (Refer to Inclusion Policy). All Contact Brant employees are expected to assist with searching for new records and updating records.
5. The management of the Community Information records includes:
  - Creating new Records to ensure new services and programs are captured in a timely fashion
  - Ensuring an annual update of each record in the Database by verifying the accuracy of all data in each record at least once per year.
  - Modifying the information as new details become available – specifically, updating Records ensuring accuracy that reflects changes in services and programs in a timely fashion or deleting existing Records when services and programs are no longer offered.
  - Working cooperatively with other I&R services to ensure there is not duplication of data collection and to share resource information.

- Writing and/or proof reading as well as editing the information in Records
- Organizing, classifying and indexing each Record
- Each record will consist of fields which provide specific information about an organization, its sites, and its services.
- The database should be structured in terms of
  - (i) The organization that operates the program or service (the agency);
  - (ii) The locations from which services are operated (the sites); and
  - (iii) The details of what they do (the services).
- The database should describe organizations:
  - What does the agency do?
  - Who does it serve?
  - When and how can people apply?
  - What does it cost and how do people pay?
  - Is the service accessible to people with special needs?
  - Who provides the service?
  - What type of agency is it?
- The Database will be appropriately indexed so that it provides different means of searching for data elements in Records. Search keys will include:
  - Alphabetical searches by Organization Name, including related acronyms or abbreviations
  - Service Searches, including preferred terms, synonyms and keywords.
  - Target populations served, where applicable
  - Geographic Areas served
  - Geographic Locations.
- Each record will have appropriate Taxonomy (refer to InformCanada Taxonomy) to support database searches for services. Indexing terms in the Taxonomy reflect one of the following concepts:
  - The type of place or facility – What the organization IS (e.g., Elder Abuse Shelters)
  - The type of service that is provided - What the organization DOES (e.g., Clothing or Personal Loans)
  - The way in which a service is delivered - How the service is delivered (e.g., Legal Counselling)
  - The type of person the service is targeted to - Who the service is for / the target (e.g., Teenage Parents). A target term should always be used in conjunction with another term.
- Generating reports and products according to organizational and community needs
- Serving as the primary liaison between the I&R service and the community.

6. The Chief Executive Officer will ensure that the Community Information Brant, Haldimand, Norfolk website link is available for the general public and professionals through Contact Brant's website.
7. The Lead Community Navigator will maintain Specialized Views for contracted agreements with partners, when appropriate.
8. The Lead Community Navigator and Chief Executive Officer will participate in regional and provincial I&R initiatives and networks that help improve the I&R sector as a whole.
  - a. The Lead Community Navigator and Chief Executive Officer will work collaboratively with the database developer(s) and the organization(s) hosting the platform(s).
9. Contact Brant will maintain membership with InformCanada.
10. The Chief Executive Officer and Lead Community Navigator will develop and review the inclusion/exclusion policy for the Database at least annually.
11. The Chief Executive Officer will be accountable to the community for the I&R services it provides, including reporting and communicating with appropriate agencies, funders and planning bodies.
  - a. The Chief Executive Officer will provide quarterly reports to the Board of Directors including the number of records.
  - b. The Lead Community Navigator and the Chief Executive Officer will respond in a timely manner to requests including print resources such as directories, mailing labels, etc. where all costs for production are covered, as well as facilitate organizations linking to the Database where appropriate