



Heart of West Michigan United Way 2-1-1 (HWMI)
Standard 11: Quality Assurance Policy
Updated June 2025

Monthly Agency Review Policy

Policy Statement

HWMI conducts monthly agency reviews to ensure the accuracy, consistency, and overall quality of the information in its resource database. At the end of each month, Database Curators participate in an agency review process, evaluating ten (10) agencies per staff member.

Purpose

This ongoing review process supports adherence to the quality standards established by HWMI, MI 211, and Inform USA. It is designed to uphold the integrity of the database and ensure reliable, high-quality information is available to the community.

Procedure

Each month, the Database Curator Team Lead assigns ten (10) agencies to each Database Curator for review. These reviews are conducted using a structured, rubric-based evaluation process guided by three tools: the Style Guide Adherence Rubric, the Custom Taxonomy Adherence Rubric, and the Inclusion Criteria Worksheet. All three tools are housed in an Excel document titled 004d Database Quality Assurance Rubrics HWMI.

The Style Guide Rubric assesses compliance with formatting and style guidelines. The Custom Taxonomy Rubric evaluates alignment with MI 211's Custom Taxonomy classifications. The Inclusion Criteria Worksheet provides a high-level review of inclusion criteria to ensure each agency complies with the current Inclusion/Exclusion Policy.

For each assigned agency, curators must review every organization, including all locations and services (potentially service at location as well), using the Style Guide Rubric. Each taxonomy term used within a service must be individually evaluated using the Custom Taxonomy Rubric. As a final step, curators complete the Inclusion Criteria Worksheet to confirm continued eligibility under the Inclusion/Exclusion Policy.



The rubrics and worksheet should be duplicated as needed to accommodate multiple entries per agency.

All reviews and corresponding edits must be completed within the same month. Findings and recurring patterns will be discussed during the team's monthly meetings to promote consistency and shared learning.

Supporting Document: 004d Database Quality Assurance Rubrics HWMI