

## **OE – 018**

### **211 Resource Database Specialist Training Manual**

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## **OUTCOMES**

### ***Chapter One***

- Meeting with Human Resources: Participants will meet with UWGA's HR team to learn about the organization's mission, history, structure and departmental roles, including the 211 service.

### ***Chapter Two***

- History of I& R: Participants will gain a comprehensive understanding of the development and evolution of Information and Referral (I & R) services, appreciating their critical role in connecting communities to essential resources.
- I & R services and Inform USA: Participants will understand the critical role of I & R services in providing accurate and reliable information, and how adherence to the standards by Inform USA ensures the integrity and quality of the I & R database. This connection emphasizes the importance of national accreditation in maintaining high service standards and enhancing the overall effectiveness of the information and referral process.
- Role, mission and function of the 211 databases: Participants will gain a comprehensive understanding of the 211 database's roles, mission, and functions, including how it supports community information and referral services.

They will also learn about the integral role it plays in connecting individuals with essential resources and support systems.

- Characteristics of a good I & R database: Upon completing this session, participants will be able to:
  - Identify and articulate the key characteristics that define a high-quality Information & Referral (I & R) database.
  - Understand the importance of maintaining accurate, up-to-date, and comprehensive information within the database to ensure effective service delivery.
  - Evaluate the criteria for selecting and organizing data entries to enhance the accessibility and usability of the database for both users and service providers.
  - Recognize the role of inclusion and exclusion criteria in curating a relevant and reliable database, thereby supporting informed decision-making and efficient resource allocation.
  - Apply best practices in managing and updating the I & R database to reflect changes in community resources and needs, ensuring continued relevance and utility.
  - By mastering these outcomes, participants will contribute to the development and maintenance of a robust I & R database that effectively supports the community's needs and enhances overall service quality.
  - Participants will understand the essential tasks and skills required for a Resource Specialist, including data management, client interaction, and the ability to effectively leverage community resources to meet client needs.
  - Participants will understand and implement comprehensive database policies and procedures to ensure data integrity, security, and compliance with industry standards and regulatory requirements.

### ***Chapter Three***

- Inclusion/Exclusion Criteria
  - Participants will acquire the skills to identify and implement appropriate inclusion and exclusion criteria for curating a relevant, accurate, and reliable database to support effective service delivery and informed decision-making.
- **Application forms**  
Participants will gain the knowledge and skills to effectively complete and process agency application forms, ensuring accuracy and compliance with required standards. They will become proficient in understanding the necessary documentation and procedures involved in the application process, which will enhance their ability to assist agencies efficiently and accurately.

### ***Chapter Four***

- **Refer/Navigate Overview**
  - Participants will develop a comprehensive understanding of the Refer/Navigate database platform. They will learn to efficiently navigate and utilize the platform to accurately refer clients to appropriate services and resources. Mastery of the platform's tools and functionalities will enhance participants' ability to streamline service delivery, ensure client satisfaction, and contribute to the overall effectiveness of the organization's resource management.
  - **Database Structure**
  - Participants will gain a thorough understanding of the underlying structure of databases, including the organization of tables, fields, and relationships. They will learn how to design and optimize database structures to enhance data retrieval and management efficiency. Mastery of database architecture will empower participants to build robust databases that support seamless data integration, querying, and reporting, ultimately improving the organization's operational capabilities.
  - **Overview of Agency Program and Site Information**
    - Participants will develop the skills to clearly differentiate between program information and site-specific details. They will learn to accurately enter and manage this information within the database, ensuring consistency and precision. By mastering these skills, participants will enhance the quality of the data, support accurate reporting, and improve the overall efficiency of service delivery within the organization.
  - **Data Elements Overview**
    - Participants will acquire a comprehensive understanding of the various data elements used within the organization's database systems. They will learn to accurately identify, define, and manage these data elements, ensuring they are correctly utilized in data entry, retrieval, and reporting processes. Mastery of these skills will enable participants to maintain high data quality and integrity, support effective decision-making, and enhance the overall operational efficiency of the organization.

## **Chapter Five**

- **Updating Agency Information**
  - Participants will develop the skills necessary to accurately update and maintain agency information within the database. They will learn best practices for data entry, validation, and maintenance, ensuring that agency records are current and accurately reflect the latest information. Mastery of these skills will support the reliability and accuracy of the database, enhance service coordination, and

facilitate effective resource management within the organization. Participants will also understand the importance of maintaining up-to-date agency information to support accurate reporting and improve overall service delivery outcomes.

- **How to Request Agency Updates**
  - Participants will learn how to effectively request updates to agency information within the database. They will gain skills in communicating clearly and professionally with relevant stakeholders to obtain accurate and timely updates. Additionally, they will understand the protocols and procedures for submitting update requests, ensuring they adhere to organizational standards and timelines. By mastering these skills, participants will contribute to maintaining the integrity and accuracy of the database, supporting reliable data for decision-making and reporting purposes.
- **Review received updates**
  - Participants will develop the skills necessary to critically review and verify updates received from various sources.
  - They will learn to ensure that the information is accurate, complete, and consistent with existing data before it is entered into the database. Mastery of these skills will support the integrity of the database, enhance data quality, and ensure that updated information is reliable for decision-making and reporting purposes.

## **Chapter Six**

- **Organizing and Indexing the Resource Database**
  - Participants will acquire the ability to effectively organize and index the resource database, ensuring that information is structured in a logical and accessible manner.
  - They will learn techniques for categorizing and tagging data to facilitate easy retrieval and improve search functionality. Mastery of these skills will enhance the usability of the database, support efficient resource management, and enable quick and accurate access to critical information for decision-making and reporting purposes.
- **211 HSIS Taxonomy Overview**
  - Participants will gain a comprehensive understanding of the 211 HSIS Taxonomy, including its structure, categories, and applications. They will learn how to navigate and utilize taxonomy to accurately classify and index resources within the database. Mastery of these skills will support consistent and precise data organization, enhance search functionality, and improve the overall

efficiency and effectiveness of resource management and service delivery within the organization.

- Basic principles of Taxonomy indexing
  - Participants will develop a foundational understanding of the basic principles of taxonomy indexing. They will learn how to apply taxonomy concepts to categorize and index information systematically within the database. Through this training, they will gain the ability to create a coherent and intuitive structure for data management, facilitating easier data retrieval and enhancing the overall efficiency of information systems. Mastery of these principles will ensure that the database remains organized, consistent, and accessible, thereby supporting effective decision-making and reporting processes.
- Taxonomy Customization for Enhanced Database Management
  - Participants will learn the principles and methodologies of taxonomy customization to better suit the unique needs of the organization. They will gain skills in tailoring taxonomy structures to ensure they are aligned with specific organizational goals, improving data classification and retrieval. Mastery of these techniques will enable participants to adapt the database's taxonomy system dynamically, allowing for greater flexibility and precision in resource management. This will support the organization's ability to maintain a high-quality database that is responsive to evolving informational requirements and enhances overall operational efficiency.
- Target Terms
  - Participants will develop expertise in using Target Terms to enhance database functionality and search precision. They will learn how to identify and implement relevant target terms that align with the taxonomy and organizational needs. This skill will enable them to optimize search results, ensuring that users can quickly and accurately find the information they require. Mastery of target term usage will significantly improve the efficiency of data retrieval, support consistent data indexing, and contribute to a more streamlined and user-friendly resource database.
  - Resource Specialist Exercise: Participants will practice skills learned in this module.

## **Chapter Seven**

- Data Entry Standards
  - Participants will acquire proficiency in applying data entry standards within the Navigate database, ensuring accuracy, consistency, and integrity of

- information while enhancing the reliability and efficiency of the database system.
- How to Make Changes to Standards
  - Participants will be able to effectively modify and implement data entry standards within the Navigate database system. They will ensure that changes are applied accurately and consistently, maintaining the database's integrity and enhancing its functionality.

## ***Chapter Eight***

- Site Visits
  - By the end of this module, participants will have the ability to effectively conduct agency site visits, evaluate compliance with established standards, and provide insightful feedback to enhance operational efficiency and service delivery.
- Type of Agency that Receives Site Visits
  - Participants will be knowledgeable about the various types of agencies that are subject to site visits, including but not limited to shelters, food pantries, and those agencies that have received repeated complaints or are not compliant with database policies. They will understand the criteria for selecting these agencies and the importance of site visits in ensuring adherence to standards and improving overall service delivery.
- Policies and Procedures
  - Participants will gain a comprehensive understanding of the policies and procedures governing resource database specialists, enabling them to effectively manage and maintain accurate, consistent, and up-to-date information within the Navigate database.

## **Chapter Nine**

- Evaluation
  - By the end of the training, participants will be able to evaluate their proficiency in modifying data entry standards, conducting site visits, and adhering to policies and procedures through comprehensive reviews at the end of each learning module. These evaluations will reinforce their understanding and provide actionable insights for continuous improvement.