

# AIRS Style Guide United Way 2-1-1 Style Guide

## 2021 Revision

For Database Curators striving to be ...

- Clear
  - Concise
    - Natural
      - Accurate
        - Consistent
          - ♦ Relevant



# AIRS Style Guide in partnership with United Way Worldwide

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### Scope of the AIRS Style Guide

- The AIRS Style Guide remains a collection of recommended best practices rather than a set of prescriptive (or absolute) solutions. The AIRS Standards require the use of <u>α</u> style guide rather than <u>the</u> AIRS Style Guide. It is also acknowledged that some I&R software might make it difficult to fully follow all of the recommendations in this document.
- ♦ The AIRS Style Guide was developed to be flexible enough to be used in various I&R settings. However, each I&R will likely require additions/amendments to this document to cover unique local needs and usage.
- Previous editions of the AIRS Style Guide provided several options in some areas, allowing members to select their preference. However, in response to member requests, this edition outlines a single option wherever possible. The United Way Worldwide advocates that 2-1-1 agencies follow a consistent resource database style based on this edition.
- ♦ This edition of the AIRS Style Guide is based on the data elements of the 9.0 version of the AIRS Standards (published July 2020).
- ♦ This edition, as with those that came before it, was overseen by a team of experienced resource database curators from across North America.
- Style is often a subjective matter and sometimes there is no inherently "right" way to style a certain data element. However, once a decision is made, it must be applied consistently.
- ♦ This document is written in U.S. English and follows U.S. spelling conventions. It is envisioned that InformCanada will use this guide as a foundation to develop Canadian versions in English and French.

## Benefits of the AIRS Style Guide

- ♦ There is a need to clearly document quality expectations.
- For new I&Rs, or a collection of I&Rs seeking to maintain a single resource database within a multi-partner environment, there is a significant efficiency to use the AIRS Style Guide as the starting point before making any modifications that may be needed to meet internal/external needs/preferences.
- As I&R and 2-1-1 grows, access to other resource databases and the ability to search them
  effectively becomes more important, especially in disaster scenarios. Consistency of data
  entry helps.

When promoting public online databases that involve resource material maintained by different organizations, variations in style make the data appear disorganized and confusing. Even if the information is correct, the overall look can diminish its credibility for public use.

## **Data Elements/Data Fields**

These two terms are sometimes used (even in this document) interchangeably. But they are different in meaning and can be handled differently depending on database software.

**Data elements** refer to specific types of information (for example, a "mailing address") while **data fields** refer to the "containers" in a specific database for one or more specific types of information.

Sometimes that "container" (that is, a data field) might contain a single data element (for example, when the data element "mailing address" is contained in the data field "Mailing Address"). In other cases, a single data field may contain more than one data element (for example, the data elements "eligibility" and "fee/payment options" may both be included within a data field called "Description Narrative").

The AIRS Standards <u>only</u> deals with "data elements" (whether mandatory or recommended) and leaves decisions as to how that information is incorporated into a database to the individual I&R agency based usually on the data design of their I&R software.

## Agency, Sites and Services/Programs

The basic structure of AIRS I&R resource databases begins with the information on the organization that provides the services (the agency), the locations from which one or more services/programs are available (the sites), and the services/programs themselves.

#### **AGENCY**

An agency is an organization that delivers services. An agency can be incorporated, a division of government, or an unincorporated group that offers, for example, a food pantry or support group. The agency operates from the main location where the administrative functions occur, where the organization's director is generally located and where it is licensed for business. An agency may or may not deliver direct services from this location.

On occasions, I&R services may choose to designate a middle level of the organization as the agency. For example, a county Department of Human Services may offer dozens of services but is often recognized by the names of its component programs such as Social Services, Health Department, etc. It is acceptable to use those components as 'agencies' as long as their relationship to the larger

Department of Human Services and the county itself is acknowledged in the description or by the way the data record is structured.

#### **SITES**

Sites are the physical locations (sometimes called branches) from which clients access services provided by an agency. An agency must have at least one site but can have several (although webbased services may have no physical location).

Site records contain identifying information about the specific location (such as address, telephone number, manager, hours, and any other detail that appears helpful about the specific location).

Some site elements (such as Phone Number) should be styled in the same manner as their counterpart element within the "Agency" record. However, the content must be specific to that location (for example, any URL should be specific to that site and not the main agency URL that was already entered at the Agency level).

#### **SERVICES/PROGRAMS**

A service/program record describes the types of assistance an agency delivers to its clients.

Technically, "services" are specific activities that can be classified using Taxonomy terms. Specific types of services should be essentially the same no matter what organization is providing them.

Sometimes agencies will provide a group of services (some primary and some secondary) and organize them as a "program". Programs may be considered as groups of services under a specific title (which could be a well-established name such as the WIC Program or a name locally created by the agency itself). For example, a job training *program* may be made up of a number of *services* such as vocational assessment, a resume preparation class and job placement assistance. While services are essentially the same across organizations, the definitions of programs may differ significantly. (Just to make it more confusing, sometimes a program name will contain the word

Service/program records generally include a narrative that offers a summary of what is provided, in addition to other key data elements such as eligibility and application procedures.

"Service" and sometimes an agency will promote a service under the name "Program").

#### **DIFFERENCES IN SOFTWARE**

Each I&R software platforms may have a different approach to record structure. Not all platforms treat the 'site' concept in the same manner. Depending on the software used, the record structure may differ slightly to include an additional 'program at site' record or may place some data elements in other locations than recommended in this guide.

## Summary of Organizational Data Elements

Note that "Mandatory" means that a data element should be filled in/entered if that information is available (for example, if you need to provide documentation to apply for a service, then that information must be added. If no documentation is required, the field can be left empty).

AIRS Data Elements	AIRS Data Record Category		
AIRS Data Elements	Agency Site Se		Service/Program
<u>Name</u>	Mandatory	Mandatory	Mandatory
AKA (Also Known As) Name(s)	Mandatory	Mandatory	Mandatory
<u>Legal Status</u>	Mandatory	Х	Х
Federal Employer Identification Number (EIN/FEIN)	Recommended	Х	х
<u>Licenses or Accreditation</u>	Recommended	Recommended	Recommended
Street/Physical Address(es)	Recommended	Mandatory	Х
Mailing Address(es)	Recommended	Mandatory	х
Phone Number(s) and Types	Mandatory	Mandatory	Mandatory
Website URL(s) including Social Media	Mandatory	Recommended	Recommended
Email Address(es)	Mandatory	Recommended	Recommended
Name and Title of Director/Manager	Mandatory	Recommended	Recommended
<u>Description</u>	Mandatory	Recommended	Mandatory
<u>Days/Hours of Operation</u>	Mandatory	Recommended	Mandatory
Physical/Programmatic Access for People with Disabilities	х	Recommended	Recommended
<u>Eliqibility</u>	х	Х	Mandatory
Geographic Area Served	х	Х	Mandatory
<u>Languages Consistently Available</u>	х	х	Recommended
<u>Documents Required</u>	х	х	Mandatory
Application/Intake Process	х	Х	Mandatory

Fees/Payment Options	Х	Х	Mandatory
Taxonomy Term(s) for Services/Targets	Recommended	Recommended	Mandatory

Data Element	Level	AIRS Standards Status
Agency Name	Agency	Mandatory
Site Name	Site	Mandatory
Service/Program Name	Service/Program	Mandatory

#### **AGENCY NAME**

This is the name of the organization that provides the programs/services that are being included within the resource database. It is the name that an organization uses to identify itself and by which it is best known to others. In most cases, this will be its full legal name but it may be the name under which the organization is more commonly known or is "doing business as" (for example, YWCA instead of Young Women's Christian Association).

#### Preferred style examples

Abacus Child Care Center
Anytown Parks and Recreation Department
Arizona Department of Labor
Big Brothers and Big Sisters of Anytown
Burton D Morgan Foundation
Evergreen Youth Services
Gathering Place
George Dodge Intermediate School
Saint Jude's Emergency Shelter
Saint Vincent de Paul Society
South Carolina Department of Health
Yellow County Social Services Department
YMCA Bluetown

#### **Guiding information**

 Use full names without abbreviations and ampersands (for example, Anytown Parks and Recreation Department rather than Anytown Parks & Rec. Dept.).

- Avoid beginning an organization name with the word "The" (such as The Gathering Place). A failure to follow this principle tends to create hard-to-follow alphabetical listings with dozens of agencies called "The X ..." and "The Y ...".
- ♦ Sometimes the official name may make that organization harder to find in a listing of alphabetical names (for example, the official name may be Anytown Big Brothers but most users would search for − and expect to find − the name under Big Brothers, so it may be styled accordingly. Similarly, the official name − and the name provided to you by the organization − may include legal words or phrases (such as "Inc") that are not relevant and not part of the everyday name. When this is the case, omit them. However, in these examples, the organization itself may insist on their preference. A database curator can argue that the key factor is user-friendliness but in the long run, it is best to maintain positive relations with the listed agency and respect their request.
- Use apostrophes in the same manner as the agency but use a version without the apostrophe in the AKA field (for example, Saint Jude's Emergency Shelter with Saint Judes Emergency Shelter as an AKA) if your software has difficulty handling apostrophes in searching.
- When naming government organizations, use the same structure for divisions of the same level of government throughout the database. For example, Sycamore County Public Health Department rather than Public Health Department of Sycamore County, which would lead to similar stylings such as Sycamore County Social Services Department.

As a general rule, always structure these records with the level of jurisdiction listed first (for example, Arizona Department of Motor Vehicles or Armstrong County Sheriff's Department).

When the organizations within a resource database are outlined in a single list, all of those government records should be grouped together in a consistently logical fashion.

- If the common name is an abbreviation, omit the punctuation (for example, ARC rather than A.R.C.). This holds true if the agency or the site name is taken from someone's initial (for example, CJ Correctional Facility rather than C.J. Correctional Facility).
- Do not abbreviate Street, Avenue, Boulevard, Mount, Road, etc. when these words appear in organization names (for example, Spruce Street Community Center).
- Do not use abbreviations for geographic areas (for example, AZ Department of Labor; US Postal Service).
- Focus on how the agency consistently spells out its name in regular text rather than how it might appear on its corporate logo, which may play with capitalization, abbreviations and punctuation for design reasons.

• If an abbreviation is a well-known part of a name and the name would otherwise seem "odd" to anyone in the community, then the abbreviated version should be preferred with the full name going into the AKA field.

Note that for all of these "style preferences", in the area of organization names, there will nearly always be exceptions to every rule.

#### **SITE NAME**

This is the name of the site/location. If an agency has only a single location, then to all intents and purposes, the agency name is usually the site name.

For example, if Abacus Child Care Center is the agency name and there is only one location, then that site name is Abacus Child Care Center. However, if Abacus operates from a second location, the agency might have an existing name that it applies to the site such as Abacus Child Care Center or Jane's Place. If not, the I&R might have to devise a way to identify the site name such as Abacus Child Care Center (Middletown Branch).

In some instances, the site name may have a distinct alternative title that has no obvious relationship with the main agency. For example, the CM Mathewson Mental Health Clinic may be a site of the regional public health authority.

In other cases, the site name may be drawn from the function that it provides for the agency. For example, if the local Salvation Army operates a thrift store at a unique location, the site name might be "created" as Salvation Army Thrift Store. If it operates a couple of thrift stores, maybe the site names become Salvation Army Main Street Thrift Store and Salvation Army Broad Street Thrift Store.

Note that the site name is not necessarily the same as a 'building name' which is really part of a standard address format.

#### **Preferred style examples**

Grey County Social Services Department – Youth Club Lakeside Library (Riverfront Branch) Mountainside Neighborhood Association – Satellite Office Ocean Hospital Outpatient Clinic Salvation Army Homeless Shelter YMCA – Mary Street Child Care Service

#### **PROGRAM NAME**

This refers to the specific name of a program. A program name is the approved name for a service or group of services that is specified by the agency, rather than a name created by the I&R service. And yes, the 'program' name might sometimes include the word 'service'.

#### **Preferred style examples of programs**

Employability
Family Literacy Program
Head Start
Mental Health Assessment Services
Substance Abuse Prevention Program
Utility Assistance Program
Vocational Training Services

#### **SERVICE NAME**

If there is no formal program name, a service name may need to be formulated by a resource specialist based on the clearest expression of the activities provided. This same service name would then need to be applied consistently to all activities delivering essentially the same thing. Generally, the service name should relate closely to the relevant Taxonomy indexing term. And yes, the 'service' name might sometimes include the word 'program'.

#### **Preferred style examples of services**

Utility Assistance
Food Pantry
Adult Literacy Service
Afterschool Program
Parenting Class
Vocational Training
Bereavement Counseling

Data Element	Level	AIRS Standards Status
AKA (Also Known As) Name(s)	Agency	Mandatory
	Site	Mandatory
	Service/Program	Mandatory

An AKA (Also Known As) is another name by which an agency, site or program may be commonly known. An agency name, site name or program name may have an AKA which is an acronym, former name, popular name, legal name, doing business as name, or some other alternative. An AKA may also be any type of name under which the organization, site or program might reasonably be searched by a user (such as a variation in spelling conventions). For example, if the organization

name is Saint Bartholomew's Catholic Church, then St. Bartholomew's Church and Saint Bart's might be added as AKAs.

If an agency does not commonly use its full legal name, then that legal name should be included as an AKA with the designation (legal name) appended. Similarly, a former name should also be labelled, as not everyone might be aware of the name change.

The AKAs can sometimes also be used to "flip" preferred name "stylings" around if desired. For example, if a decision has been made to use YWCA Anytown as the preferred organization name, then Anytown YWCA could be used as an AKA.

#### **Preferred style examples**

Anytown Recreation Division
Anytown Big Brothers and Big Sisters
Anytown YMCA
Big Sisters Anytown
EYS
Northtown Home Care Association (former name)
Jude's Place
Saint Judes Emergency Shelter
St Jude's Shelter
Info Greentown
Community Information Center of Greentown (legal name)
St Vincent de Paul Society

	Level	AIRS Standards Status
Legal Status	Agency	Mandatory

The legal status of an organization describes the type of organization or conditions under which the organization is operating. For example, a private, nonprofit corporation, a for-profit (commercial, proprietary) organization, a government (public) organization, or a grass roots entity such as a support group that is not incorporated and has no formal status as an organization.

#### Preferred style examples

Nonprofit (Incorporated)
Nonprofit (Unincorporated)
Faith-based
Coalition
Cooperative
Commercial [preferred to for-profit]

Government [the level of government is covered in the agency name]
Special District
School Board
Private Practice

Data Element	Level	AIRS Standards Status
Federal Employer Identification Number	Agency	Recommended

A Federal Employer Identification Number (FEIN), is a unique nine-digit number (xx-xxxxxxx) that the IRS (United States Internal Revenue Service) assigns to business entities. The IRS uses this number to identify taxpayers that are required to file various returns. FEINs are used by employers, sole proprietors, corporations, partnerships, nonprofit organizations, government agencies, certain individuals and other business entities.

The FEIN is also known as an Employer Identification Number (EIN), a Federal Tax Identification Number, and a Tax ID. Within an I&R database, it provides another option for matching records in merged databases to help eliminate duplicates.

#### Preferred style example

87-8573645

Data Element	Level	AIRS Standards Status
Licenses or Accreditations	Agency	Recommended
	Site	Recommended
	Service/Program	Recommended

If an agency operates either with or because of a license or accreditation secured through an external entity, then this should be recognized within the I&R database record. For example, a child care center of a certain size could only legally conduct business if it has a license, or a nursing home would require specific accreditation to operate.

When possible, it is helpful to provide the full name of the licensing body to provide users with the opportunity to confirm credentials. This can also be helpful when reviewing an agency for inclusion if

only certain types of organizations are included if they are licenced, such as assisted living facilities or child care centers.

It is best to use this field with discretion. For example, a school board would obviously only employ teachers who are licensed to teach. The emphasis should be on providing helpful information to users, particularly in service areas where perhaps some organizations are licensed but others are not (for example, within home help).

#### **Preferred style examples**

Home care provider licensed by Green State Human Services License Directorate Community health clinic accredited by Red State Hospitals Board

Data Element	Level	AIRS Standards Status
Street/Physical Address(es)	Agency	Recommended
	Site	Mandatory

The street address describes the physical address of the site(s) from which the agency operates. The components of a street address follow an accepted standard format for expressing addresses.

Some agencies may withhold their physical address for confidentiality reasons (for examples, shelters for women who have been abused). In these cases, enter "Address Confidential"

Note that there may be organizations that have no actual or relevant physical address. In these cases, leave the address information blank but make sure there is a clear indication that an agency is 'Online only' in its description field. Depending on the database software, a partial address or zip code may need to be entered to aid in searching.

#### **PREADDRESS LINE**

A preaddress line contains address information that may not always be "readable" for a geographic mapping program such as Google Maps (for example, MacDonald Building or Fawlty Towers).

#### **ADDRESS LINE 1**

Address Line One is used for the actual street address.

#### **ADDRESS LINE 2**

Address Line Two is reserved for an additional component such as the apartment, suite or unit number.

An address will generally consist of one of the following combinations:

- Preaddress Line Address Line One Address Line Two
- 2. Address Line One Address Line Two
- 3. Address Line One

The following is an example of an address that uses all three lines:

Ethelred Towers 17 Oak Drive Suite 17

However, "Line One" and "Line Two" may be entered as separate data fields but usually displayed in a traditional address format (that is, on one line):

Ethelred Towers 17 Oak Drive, Suite 17

The Preaddress Line can also be used when another agency is acting as the host for a smaller organization (for example, a mental health clinic that serves as the "base" for an independent mutual support group):

c/o Anytown Mental Health Services 876 Blackberry Boulevard, Unit 67

#### **Preferred style examples**

100 Main Street, Suite 400
City Hall, 100 Main Street West, 7<sup>th</sup> Floor
14 Fir Crescent
587 4<sup>th</sup> Street
85 Acorn Boulevard
9206 Willow Street NW, Unit 470
9206 South Willow Street West, 4<sup>th</sup> Floor
Hawthorn Heights Building, 500 Orange Blossom Street, Unit 4
Online only

#### **Guiding information**

- Although there are standard abbreviations (for example, Ave) that will be read by geomapping programs and are officially approved by the postal service, if the software field permits the number of characters, use the full spelling (for example, Avenue) to remove any possibility of ambiguity.
- ♦ Some addresses will be provided by agencies in the style of "234-111 Cedar Street". Although this is officially recognized, it is not intuitive for users so enter the address as "111 Cedar Street, Suite 234" to be clear. If you are unsure whether it is a "suite", use the more flexible word "unit".
- ♦ Do not use "#" as an introduction to a number. For example, change 16 Balsam Avenue, #24 to 16 Balsam Avenue, Unit 24.
- ♦ If the street name incorporates a "direction" (such as Young Street North or Old Avenue South), enter that in full. The exception is for cities that have addresses that reflect a larger grid, an abbreviation can be used if it is part of the established format (such as 453 Wood Road NW or 67 SE Stone Place). There may also be some other exceptions based on accepted local terms such as 678 MLK Boulevard.

#### <u>CITY</u>

This is the part of the physical address that describes the major city or town from which the site operates. The name of the city follows the street address and precedes the state/province and ZIP/postal code in conventional postal service format.

Again, standard and full spellings should be used. The key is consistency. All agencies in a certain defined community need to have the same city address.

#### **Preferred style examples**

Davistown Gillespieville Saint Paul Parkerton

#### **COUNTY**

The I&R software may prompt 'county' at this stage. Although not a formal part of the address, this is a useful aid in being able to identify agencies *located* in a particular county (which of course, is not the same as agencies that may *serve* that county). However, software programs can usually auto-identify 'county' through either the city or the ZIP code.

#### **STATE/PROVINCE**

The designation of the state/province must be part of the site address of the organization. Use only the official two-letter code for all states, provinces and territories.

Do not use a period to denote the abbreviation (for example, use AK rather than AK.) and always use upper case (for example, AK rather than Ak).

#### **Preferred style examples**

ΑZ

DE

MA

PR

#### **ZIP/POSTAL CODE**

The ZIP code and the postal code must be part of the site address. This element must use the fixed official structures used by the respective national postal services of the United States and Canada. The 'extended' United States ZIP code contains five numeric digits along with a hyphen followed by four additional digits. However, the first five are the only ones required, and denote a wider area in which individuals place themselves (for example, "I live within the 40812 ZIP code") and which are used for searching. Do not enter the additional four digits. A Canadian postal code consists of six characters – alternating upper-case alphabetical and numerical elements (ANA NAN) with a single space between the pairs of three characters.

#### **Preferred style examples**

40125

68516

V9Z 2T9

#### **COUNTRY**

This is not usually required and may be a default (e.g. US or Canada) but some resource databases may require the need to list agencies based in other countries. For example, some border communities may decide to maintain a few records of organizations in the neighboring/neighbouring country.

Data Element	Level	AIRS Standards Status
Mailing Address(es)	Agency	Recommended
	Site	Mandatory

The mailing address describes the official postal address of the site(s) from which the organization operates when that address differs from the physical address (i.e. if there is no specific mailing address, then the physical address is the 'official' address and the only address required). The mailing address is constructed from the same data components as the physical address in terms of address line, city, state/province, ZIP code. If there is no mailing address, do not enter any information under that field. The exception is if the field displays even if empty in which case simply enter 'No separate mailing address' (and most software prevents this happening). Note that only the United States Postal Service can deliver to a PO Box.

Generally, you cannot "go to" a mailing address but you should be able to "go to" a physical address. Avoid abbreviating the PO Box as P.O. Box., or General Delivery as GD or G.D.

Even if a resource is "Online only", generally inclusion criteria should advocate for some type of mailing address to verify the accountability of the resource.

#### Preferred style examples

PO Box 45 Ironton, MA 68573

General Delivery Leadhampton, ID 86352

General Delivery, Bag 3 Copper Valley, KS 86934

Data Element	Level	AIRS Standards Status
Phone Number(s) and Types	Agency	Mandatory
	Site	Mandatory
	Service/Program	Mandatory

This details the phone (and now, text) number(s) used to reach a particular agency, site or service/program. In addition to the actual number including possible extensions, there may be contextual information that describes the type and/or function of the phone (e.g., toll-free, administration, intake, etc.).

A fax is usually entered as a separate data field and identified as a 'fax number', although the relevance of a fax number is diminishing. The logical assumption is that a call is going into a "normal" voice telephone unless indicated otherwise.

An agency might have several phone numbers for different purposes (e.g. after-hours, Spanish only, alternative number). Note that phone numbers for sites and/or services/programs are only included if they are different from the main agency phone numbers.

#### **PHONE NUMBERS**

#### Preferred style examples

(250) 467-9836 1-800-976-9760 1-800-435-7669 (1-800-HELP-NOW) 2-1-1 9-1-1 (123) 456-7890, ext. 527 211 787 (211 TXT) (Text only) 865-987 (Text only) No phone service available

#### **Guiding information**

- ♦ The construction (250) 675-8615 is clearer for users than 250-675-8615 (although not all software may accommodate this preference).
- Even if all of the phone numbers in a database share the same area code, you still need to include it in each instance for the use of those contacting an agency from another region.
- ♦ Use hyphens on 9-1-1 and 3-1-1 to ensure the digits stand out clearly.
- ♦ Toll-free numbers should include the "1" to make sure that is clear. The words "Toll-free" should also be added in another area. Try to establish where the toll-free service is available.
- ♦ If there is a "named" number, such as 1-800-HELP Now, list the actual number of the service (for example, 1-800-435-7669) but try to transfer the 1-800-HELP-NOW reference into another data area).
- ♦ An extension should only be used if it is helpful (particularly where there is an automated switchboard and the extension saves a great deal of menu choices) and/or is recommended

by the agency itself. In most cases, calls to agencies go to a main switchboard and are then diverted to the particular person.

#### **PHONE TYPES**

This provides some contextual information about the type and/or purposes of a phone number.

#### **Preferred style examples**

Administration (avoid using 'Admin')

After Hours

Text only

Fax

**Answering Service** 

TTY

Alternative Number

Hotline/Helpline

**Recorded Messages about Services** 

Intake

Voicemail messages only

Toll-Free

Toll-Free (English Only)

Toll-Free (Spanish Only)

Toll-Free within service area

Toll-free within state

Data Element	Level	AIRS Standards Status
Website URL(s) including Social Media	Agency	Mandatory
	Site	Recommended
	Service/Program	Recommended

A URL (Universal or Uniform Resource Locator) is a way of specifying the location of a file or resource on the Internet. Also commonly known as a website or web address. In the resource database, the agency URL should be the official main website of the organization but can also include a database URL and links to various social media.

In most instances, the fixed structure should be along the lines of www.orgname.org ... in other instances, the URL may point to a specific file/resource within an organization's website (for example, www.airs.org/standards.asp).

Avoid using http://www ... (although there will be occasional websites that only use the http://designation).

The URL can be pointing to a social media address other than a website (for example, www.twitter.com/ouragency). Ideally, you can identify the different type of websites on the software display (for example, Twitter: www.twitter.com/ouragency).

A site or service/program URL should only be included if it is unique to either that particular location or service/program.

#### **Preferred style examples**

www.airs.org www.arbitrary.com http://airs.org

www.air.org/application.doc

Resource Database: www.211ourtown/resourcedatabase

Twitter: www.twitter.com/ouragency Facebook: www.facebook.com/ouragency

Data Element	Level	AIRS Standards Status
Email Address(es)	Agency	Mandatory
	Site	Recommended
	Service/Program	Recommended

Email refers to a mail address for online communication.

This should refer to the main email address of an agency (for example, info@agency.org rather than the email of an individual such as an Executive Director. The email address must be entered in the standard format of a valid email address (i.e. x@x.yyy).

#### **Preferred style examples**

info@airs.org ymca@isp.net airs@info.org ourtowninfo@gmail.com

Data Element	Level	AIRS Standards Status
Name and Title of Director/Manager	Agency	Mandatory
	Site	Recommended
	Service/Program	Recommended

At the agency level, this data element refers to the single person that heads the organization. This person is the individual who is ultimately accountable for its operation. It would not usually be someone who is directly contacted except when an issue such as a serious complaint is concerned.

There should always be an individual listed for every organization. When an organization has two or more sites, there may or may not be a single person who can be listed in the role of site manager.

At the program level, the individual is the contact for providing the service (for example, the Program Coordinator). This is only included when there seems to be a particular reason, and usually this level of detail is not required.

#### **NAME AND TITLE**

This information is generally broken down in a software program under two elements - (1) the title and (2) the name (first and last name with options for the use of initials).

(1) The contact title reflects the formal job position of the person. Generally, titles are written in full (for example, Executive Director instead of ED). Occasionally, you may encounter an agency that describes itself as a Collective. In this case, it is best to simply ask for one name to serve as the "Office Contact".

#### **Preferred style examples**

President and Chief Executive Officer
Chief Medical Officer
Administrator
Office Coordinator
Director
Director of Operations
Coordinator

(2) The name preferably includes both the first and last names and should be entered in full. The preference is to omit any gendered or honorary titles unless the agency is persistent. However, if a preferred pronoun is provided, it should be included. A medical doctor is an exception in which case 'Dr' is all that is needed. Generally, omit

credentials that come after a name (for example, MSW or PhD) unless insisted upon by the agency.

If an agency provides a formal expression of the main contact's name (for example, Mrs N M Wilkinson), then that should be respected.

#### **Preferred style examples**

Dr Jenny A Jenkins
Jim Jameson
Father John Seymour
S. W. Rodriguez
Hanif Mohammed
Anne Hughes-Simmons
Victoria Allinson (they/their)
Alex Henderson (she/her)
A. Thatcher (he/him)

Data Element	Level	AIRS Standards Status
Description	Agency	Mandatory
	Site	Recommended
	Service/Program	Mandatory

#### **AGENCY DESCRIPTION**

The agency description is a summary of the organization's prime nature and activities. It is a helpful way of understanding the broad nature of an agency if its name is not well known or its purpose is not very evident from its title.

If an agency has an affiliation or a relationship with other organizations that might not be obvious from their title, then this should be mentioned here (for example, Hamilton Youth Services might be formerly affiliated with the National Boys and Girls Clubs).

The description should be brief and not duplicate the more detailed service records.

#### **Preferred style examples**

Children's mental health clinic

Comprehensive employment center

Emergency shelter for assaulted women

Federal government financial assistance program for income eligible older adults

Food pantry and meal program

Multiservice agency operating a variety of neighborhood programs, services and supports

Support services for assaulted women, including an emergency shelter

Resources for veterans (online only)

Social and recreational services for youth. Affiliated with Boys and Girls Clubs of America

#### **SITE DESCRIPTION**

The site description is a brief statement of no more than 1-2 sentences that describes the primary activities that take place at the site. If the agency has a single site, then this is covered by the agency description and need not be duplicated. If the agency operates from more than one location, then a brief site description is recommended for each one. In some instances, in which the same services are available from each location, the site descriptions might all be identical.

#### **Preferred style examples**

Mental health drop-in

Training center

Commercial child care center

Emergency shelter for homeless men

Federal government financial assistance program for income eligible older adults

Food pantry and meal program

Thrift store

#### SERVICE/PROGRAM DESCRIPTION

A service description provides an opportunity to more fully describe the nature of a service in order to help someone make an informed decision on a referral.

In many ways, it is the most important field and the one that requires the most skill in terms of deciding the content and then delivering that content with concision and clarity.

The service description is the place to provide contextual information (for example, on secondary and ancillary services). It is also a place where other data elements (such as appropriate licensing information or affiliations can be added if there are no specific fields for those elements and their inclusion would be helpful. Where relevant it can also be the place to provide additional information.

The description should be written in specific enough terms to enable community resource specialists and the general public to determine whether this resource is an appropriate referral.

The description must reference and describe all of the services indexed using the Taxonomy.

#### **Preferred style examples**

- Mutual support group for alcoholics. Regular meetings at a variety of times and locations throughout Rockland County.
- ♦ Licensed child care center for toddlers and preschool children.
- ♦ Works with Green State Department of Labor to secure placements, part-time and full-time employment for Grey County Community College students and alumni.
- Support for day laborers within the Spanish-speaking communities providing a safe place for workers to wait to be picked up for daily jobs. Light breakfast available and referrals to ESL programs.
- Classes, workshops and conference offered multiple times throughout year for unpaid caregivers who are looking after an adult family member or friend. Classes and events include Powerful Tools for Caregivers, Caring for Your Loved One at Home, Yoga for Caregivers and annual caregiver workshops. Respite may be available with early registration. Website includes calendar on upcoming events.
- Local branch of national organization. One-to-one meetings to assist patients and families with free advice to help solve problems related to finances, insurance, employment and costs resulting from a cancer diagnosis.
- Online support service for caregivers, includes live chat support.
- Health care services provided in-home for illness or injury. Includes wound care for pressure sores or surgical wounds, patient and caregiver education, intravenous or nutrition therapy, injections monitoring serious illness and unstable health status.
- ♦ Alternative to court system for resolving civil and minor criminal disputes such as tenant/landlord problems, neighborhood disputes, small claims and family conflicts. (Note that this is not appropriate for disputes associated with domestic violence).
- Supports young volunteers in programs geared towards environmental quality and awareness. Individuals can commit 675 hours of service year-round or 300 hours over the summer. Living stipend is provided and a monetary educational reward is given upon completion of service hours.
- Promotes healthy lifestyles, good nutrition and home budgeting to food stamp recipients/applicants. Classes and home visits from dieticians and home economists.

#### **Guiding information**

♦ Construct the narrative with the most important information coming first and the least crucial piece of information listed last.

- As a general rule, adjectives and adverbs can be eliminated.
- When creating a list, use commas rather than semi-colons. If a list exceeds four items, a simple bullet format can be used, (and the format chosen should be consistent across the database).
- Write in third person.
- Use active verbs and clear language.
- ♦ Do not accept the narrative directly from the agency.
- Service descriptions should be precise but also meaningful. They should anticipate any questions that a client might reasonably ask that have not been addressed in other fields. However, it should not include every conceivable piece of detail these issues are best addressed by the client contacting the program directly.
- Avoid using full sentences such as "This program provides peer counseling within a supportive environment ..." if "Peer counseling available" gets to the point quicker and is easier for the community resource specialists to read.
- Avoid over-elaborate phrases (usually supplied by the agencies themselves in their completed surveys) such as "Provides a family-focused model based on empowerment and individualized expression ..." Ask yourself, "What are they actually doing and what would a potential client really want to know?"
- ♦ Avoid abbreviations such as e.g. or i.e. if possible. Use "for example" and "that is" or "that means".
- Avoid subjective language (such as "highly qualified staff) and social service jargon.
- Prefixes and hyphens: The common sense rule is only to use a hyphen if the word looks strange without it. Generally, if the prefix ends with a vowel and the word that follows it begins with a vowel, then a hyphen may be needed (for example, pre-empt rather than preempt). Some words, however, are well established enough to not require a hyphen (for example, coordinate and cooperate).
- Within your own database, try and standardize your descriptions for identical services as much as possible. For example, all services describing utility payment assistance programs should be written in a similar fashion.
- Omit minor details that would be hard to consistently update and that can be left to the client to discover when contacting the program.

Data Element	Level	AIRS Standards Status
Days/Hours of Operation	Agency	Mandatory
	Site	Recommended
	Service/Program	Mandatory

This refers to the days and times an individual can access either the administrative hours of a facility or the hours of a particular service/program.

In some I&R software programs, this information may be organized in a structured way as per the following table which can allow for filtered searches (e.g. Food Pantries and Friday).

Sunday	From:	To:
Monday	From:	To:
Tuesday	From:	To:
Wednesday	From:	To:
Thursday	From:	To:
Friday	From:	To:
Saturday	From:	To:

However, in most instances and even in the above situation, a string of text is required to provide the information. There are probably twenty different combinations of ways to enter days and hours of service. Within the overall Standards, there is no 'wrong' way providing that way is used consistently. Depending on the software, it may be necessary to determine when hours should only be entered in a structured field or only in an open text field and/or how they should both be used.

However, a survey completed by more than 70 resources specialists offered five choices (and with a further eight variations offered as write-in suggestions), resulted in 40% selecting the method used below with no other choice accounting for more than 7% of responses.

If Live Chat or Text is available, then this can be added here.

In some cases, a service/program may only be available on a seasonal basis in which case that information may also be entered in this area.

#### Preferred style examples

Mon-Fri 9am-5pm

Mon-Wed 8am-11:30am, Thu 2pm-8pm, Fri 8am-11:30pm

Mon 12 noon-4:30pm, Tue-Wed 11am-11pm, Thu 6pm-12 midnight

Mon-Fri 8:30am-4:30pm (Also Live Chat available on main website Mon-Fri 10am-2pm)

Irregular – call for details

Mon-Fri 10am-5:30pm (Phone service only available Sat-Sun 10am-4pm)

Mon-Fri 8:30am-4:30pm (Closed lunch 12 noon-1pm)

Mon-Sun 24 hours

Seasonal from October 8<sup>th</sup> to December 24<sup>th</sup>

#### **Guiding information**

Organize the information in terms of the order of the week (that is, start on Monday and end on the last day that service is available (usually Friday or Sunday).

To be certain of clarity, use 12 noon and 12 midnight instead of 12am and 12pm.

If a service is closed during lunchtime that information should be included.

Data Element	Level	AIRS Standards Status
Physical/Programmatic Access for People with Disabilities	Site	Recommended
	Service/Program	Recommended

This describes the factors that either help or hinder access to the site/location for persons with physical disabilities.

When surveying agencies on their accessibility, it is helpful to provide a specific list of options (such as some of the items listed as style examples) for the agency to select. An open-ended survey tends to produce broadly positive statements such as "Fully accessible" or "Partially accessible" without providing any details on what exactly that means.

Remember that access for persons with physical disabilities covers more issues than wheelchair access. If the service is only offered online, web accessibility information should be added when possible. Ask the agency if the website includes any text, audio, or video alternatives, or if it has been designed to be keyboard accessible. More information about the guidelines can be found on the Web Content Accessibility Guidelines (WCAG) Overview.

A standard phrase could be considered for all situations where a community resource specialist is asked about physical access such as "Visitors with concerns about the level of access for specific physical conditions, are always recommended to contact the organization directly to obtain the best possible information about physical access."

#### **Preferred style examples**

Wheelchair access to main entrance via ramps

Accessible washrooms

No wheelchair access

Accessible apartments including wheel-in shower

Lowered elevator buttons

Wheelchair-level button opens main doors

Designated parking spaces

Wheelchair access possible with appointment

Braille elevators and signage

Tone elevators

Visual alert systems

Wheelchair access – but call for details

Keyboard accessible

Captions available for audio and video content

Data Element	Level	AIRS Standards Status
Eligibility	Service/Program	Mandatory

These are the guidelines that illustrate who may apply for a particular service/program. Essentially, eligibility outlines the general target population for that service.

Eligibility is preferably expressed in terms of requirements, for example, Single parents only", although occasionally some exclusions may be included such as "Previous participants are not eligible".

The actual determination of final eligibility is according to the discretion/polices/decisions of the service provider. The role of the I&R is to accurately document who is **eligible to apply** for the service/program.

In some I&R software, there might not be a separate field for eligibility and so this information may need to be included within the first or second sentence of the service description.

In order to facilitate searching by eligibility, some I&R software may structure selected eligibility criteria (e.g. age and gender) in a format that supports the ability to filter searches (for example, 'females' '65 years and over'.

This data element should be focused on those circumstances where the eligibility is specific and not obvious by the nature of the service/program or the organization providing it. For example, a food pantry is for individuals who need food. This fact probably does not need to be re-stated. However, there might be some specific information that needs to be included such as "Only individuals living in Longton may apply". Similarly, an employment center is for someone looking for a job or training to get a job. And a library is for people wanting to borrow books (although if a library has a reading

program for children of a particular age range, then that needs to be stated in the eligibility area for that particular program).

It is often a judgment decision but which once made, needs to be consistently applied to all similar records.

In some cases, eligibility may be very complex or frequently changing. When presented with criteria too difficult to describe, it is acceptable to provide a summary of the key criteria while also providing a link (when possible) to more detailed information on the agency website.

Another variation is whether this field displays when it contains no information. If it does, then having a field saying "Eligibility" with nothing entered in it, might be confusing for users. In which case, some information needs to be included for every service/program record, and for instances where the service is essentially 'open to everyone who needs it', the default statement should be "Open to all".

#### **Preferred style examples**

Open to all

Medicaid recipients age 21 years or older

Youth from 16 to 18 years, individuals up to 21 years may occasionally be considered

Individuals living with AIDS/HIV and their caregivers

Older adults of Tangerine County who are age 65 years or older

Children from 4 years to 12 years

Individuals with compulsive eating disorders

Older adults 55 years and up, residing in Melon Township

Apple County residents at risk of eviction

Veterans and their dependents

Children at risk of abuse

Pear City parents on low incomes with children from six weeks to 14 years

Individuals in acute mental health crisis

Employees with injuries or illnesses connected to their employment

Individuals with physical disabilities or recovering from or living with illness/injury

#### **Guiding information**

- ♦ Eligibility can be based on a number of factors such as age, gender, geography, physical and/or mental health, language, cultural background, income and geographic location.
- Geographic eligibility can often be handled more precisely within the Area Served field. However, a clear textual expression of eligibility is always helpful if it narrows the target group to a particular area.
- For this field and in other areas, the general policy should be to try and handle information in a positive fashion (i.e. who a service/program is for rather than who it is not for).

- Generally, use 'individuals" or "persons" rather than "people", "everyone" or "anyone".
- Use "person first" language. For example, "Individuals with physical disabilities" rather than "Disabled persons".
- Also try to avoid labeling language, even if sometimes it seems a little contrived. For example, "Individuals who are in correctional facilities" rather than "Persons in jail".
- Use numerals for ages as it is easier to read. The exception is to use "birth" rather than "0". For example, "From birth to 3 years".

Data Element	Level	AIRS Standards Status
Geographic Area Served	Service/Program	Mandatory

Geographic area served refers to the physical boundaries in which a service is available and by definition, not available to clients outside of those boundaries. The concept of "area served" is different from "location" as a service may be located in one area but serve several definable areas or only serve parts of the one area.

This geographic "boundary" can be national, statewide, regional, countywide, citywide, a school district, comprise a single or several ZIP codes or be restricted to a narrow neighborhood.

Geographic area served should be described in narrative form in the eligibility or description fields and represented in a structured form that facilitates the searcher's ability to filter data. Within the software, a service covering Carzola County would be found by a search for services in that county or for all the ZIP codes that are included in that county. For example, if area served is included as structured information, users are able to search for a home delivered meal program for a woman who lives in the ZIP code 60656, and the system will filter out services that are unable to serve her ZIP code.

Within a single local database, there may seem no need to state for every single service that it is designed for individuals in that region – but this becomes important to enter if the information is ever incorporated into a larger database, and also ensures clarity for users from outside the region who would be less informed about the boundaries.

#### **Preferred style examples**

Jones County Metropolitan Smithville Southern Brownchester from below 4<sup>th</sup> Street and west of Williamsboro Highway 43204, 43207 and 43311 ZIP codes Statewide National Berry, Greenville, and Peach Counties

Data Element	Level	AIRS Standards Status
Languages Consistently Available	Service/Program	Recommended

The specific languages (other than English) which are consistently available in a particular service/program.

In order to facilitate searching by language availability, some I&R services structure language information in a format that supports the ability to filter data. Users are then able to search for a particular type of service in Spanish and the system will filter in those that match the criterion.

Agencies often tend to exaggerate language available. Try to only list languages that are regularly and consistently available. There is a difference between a program that provides Spanish services as part of its mandate and one that has a part-time volunteer who speaks Vietnamese.

If the software does not display an empty field and the service is only available in English, this field can be left blank.

If the field still displays when it contains no information, then having a field saying "Languages" with nothing entered, might be confusing for users. In which case, information needs to be included for every service/program record and in these cases the default statement should be "English only".

If a number of languages are available include English (if it is one of those languages) and list it first, with the other languages being listed in alphabetical order.

#### Preferred style examples

English only
English and Spanish
Spanish only
English, Arabic, Farsi, Pashto, and Urdu
English, Chinese (Cantonese), Chinese (Mandarin), and Korean
English, Italian, Portuguese, and Spanish

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Data Element	Level	AIRS Standards Status
Documents Required	Service/Program	Mandatory

Documents that will be needed by the client when following up with the referrals provided (that is, material/information that needs to be taken to the agency in order to access the service).

If the software does not display an empty field and no documents are required, this field can be left blank.

However, if the field still displays when it contains no information, then having a field saying "Documents Required" with nothing entered, might be confusing for users. In which case, information needs to be included for every service/program record and in these cases the default statement should be "No documents required".

Ideally, in this and similar fields, the I&R software should have a dropdown box to make data entry easier, eliminate typos and ensure consistency. However, in addition to an 'other' option to allow for the inevitable variations, this area should allow for the selection of multiple options as one service might require Picture ID and Income verification. While another might need Proof of address and Two forms of picture ID.

#### **Preferred style examples**

No documents required
Program prefers clients to call for details
Picture ID
Two forms of picture ID
Driver's license
Proof of address
Proof of age
Social Security card
Physician order required
Income verification
Birth certificate

Data Element	Level	AIRS Standards Status
Application/Intake Process	Service/Program	Mandatory

The application process provides clients with information on the "next steps" to take to access a particular program/service.

In many cases, the directions are fairly obvious in the sense of "Call or walk in for service" but many agencies have very specific requirements (for example, walk-ins will not be accepted, individuals must call first ... or there must be a professional referral).

Ideally, in this and similar fields, the I&R software should have a dropdown box to make data entry easier, eliminate typos and ensure consistency. However, there always needs to be an 'other' option to allow for the inevitable variations.

#### **Preferred style examples**

Appointment required
Call to apply
Walk in for service
Physician referral required
Call or walk in for service
Referral required
Online only
Intake conducted Mon-Fri 9am-2pm; Phone Mon 9am-5pm for an appointment.

Data Element	Level	AIRS Standards Status
Fee/Payment Options	Service/Program	Mandatory

The fee/payment options detail the cost of receiving a service. It can also include information about how a particular service can be paid for (e.g. if it might be covered by certain benefit programs).

Most services within an I&R database are 'free', although 'no fee' is a better way to describe that fact as there is always a 'cost' to provide a service. Clients need to know if there is a fee and, if so, approximately how much it is and/or how it is calculated.

Typical phrases include "sliding scale" and "no charge" or "fixed fee." Specific dollar amounts are generally omitted. It is helpful to provide clients with some idea of fees when they are applicable but it is difficult to effectively maintain that information.

As in previous examples, if the software does not display an empty field and the service is free, this field can be left blank.

If the field still displays when it contains no information, then having a field saying "Fees" with nothing entered, might be confusing for users. In which case, information needs to be included for every service/program record and in these cases the default statement should be "No fees".

#### **Preferred style examples**

No fees

Medicaid

Medicare or other third-party payment accepted

Call for details

Sliding scale. Call for details

Suggested donations

Nominal cost

Membership fee

Fees vary by program. Call for details

Medicare, private insurance and private payment accepted

Sliding scale if no insurance

Sliding scale if no insurance but no one refused service

Private insurance and/or private payment only

Private payment only

Data Element	Level	AIRS Standards Status
Taxonomy Term(s) for		
Services/Targets	Agency	Recommended
	Site	Recommended
	Service/Program	Mandatory

This refers to the indexing service term (and sometimes accompanying target term) and associated code(s) drawn from the <u>AIRS/211 LA County Taxonomy</u> whose definition most closely matches the service being defined.

Every distinct primary service should be indexed with the appropriate Taxonomy.

## Summary of Record Administration Data Elements

AIRS Data Elements: Record Administration	
Unique ID Number	Mandatory
Record Ownership Code	Mandatory
Date of Last Annual Verification	Mandatory
Date of Last Interim Change	Mandatory
Contact for Last Change	Recommended
Resource Database Curator for Last Change	Recommended
Record Status (Active/Inactive)	Mandatory
Record Inclusion (e.g. displayed online, in specific portals, directories, etc.)	Mandatory

#### **UNIQUE ID NUMBER**

The record ID number is a unique numerical code that is affixed to every single agency record within a resource database. Although the organization's name might change, its unique number will remain the same.

Most I&R software systems automatically generate a new number for every newly created database record. There is no "official" limit to the number of digits that can be used (although five should be more than sufficient)

#### **RECORD OWNERSHIP CODE**

This is a code that identifies the I&R program that maintains (otherwise known as 'owns', 'curates' or 'stewards') the database record. In I&R resource databases, the record ownership code is usually automatically generated by the I&R software to combine with the Unique ID Number to create one distinct code that identifies both the I&R program and the individual organization record (for example, ABC2247 or LA007924).

This code is particularly helpful within collaborative databases that might contain the merged database records of two or more I&R agencies, as otherwise two agencies are almost certain to maintain different records with the same record ID number (for example, 00829 and 00829).

Agencies operating within a consolidated system need to ensure that no two participating agencies share the same record ownership code.

In the future, national collaborative resource databases may emerge, in which case there would be a benefit to establish a universal system for curated I&R data that consisted of a code that used two characters to match the state abbreviation for the record owner's location (that is, the record itself could be concerning another state, but the "ownership" code is for the agency maintaining the record), followed by a four to eight-character string (possibly identifying their city).

# **Preferred style examples**

33ABC NYMINN NDFARGO NDFARGO2

# **DATE OF LAST ANNUAL VERIFICATION**

This is the date on which an agency record was last formally verified as part of a scheduled annual update as described in the AIRS Standards. This occurs when the agency was contacted and all of its information was completely verified. In some instances, no actual changes might be made but the record is still 'updated' (i.e. there was a positive verification that no changes were needed).

All of these data elements are primarily administrative fields, although the date of last formal verification is a field that could be publicly displayed as it demonstrates accountability.

# **DATE OF LAST INTERIM CHANGE**

The AIRS Standards refer to an interim change or partial update/modification as a piece of agency information that has been changed and verified by the agency in between the annual formal verification.

## **CONTACT FOR LAST CHANGE**

This is the individual at the agency/organization who provided and/or verified the information at the time of the last data record change (whether it was the formal verification or the last interim change). The contact information should follow the same structure as for directors/managers (i.e. name, title, email, etc.)

### RESOURCE DATABASE CURATOR FOR LAST CHANGE

This element names the resource specialist responsible for the last change to the agency record. In this and in some other administrative areas, if the information does not have a direct placeholder in the I&R software, there might be other ways to maintain these types of details.

# **RECORD STATUS (Active/Inactive)**

Record Status indicates whether or not an organizational record is or is not included as part of the overall the resource database – essentially it is a Yes/No designation on whether it is Active or Inactive. A record may be made Inactive for various reasons, for example, it is still under research, it is a seasonal resource that is only available for certain parts of the year, it cannot be formally verified, or the agency has asked not to be included because of its own lack of resources.

# RECORD INCLUSION (e.g. displayed online, in specific portals, etc.)

Record Inclusion details whether or not an active organizational record is or is not included in specific views and/or outputs of the resource database. Examples: a new record may be accessible for database curators while research is underway but not viewable by community resource specialists; a record may be included for community resource specialists but not for the general public on the online version; a record may be included in various specialized views/sets of the resource database such as an online portal on employment issues or a directory on re-entry programs.

# Appendix A: Preferred Written Usages

# **Gender-Neutral Language**

- ♦ Strive to eliminate casual use of "man", (for example, man-made disaster, mankind: use disaster of human origin, humanity, people).
- Occupations: firefighters, not firemen; police officers, not policemen and police women, chair, chairperson or presiding officer, not chairman.
- Respect the personal pronoun preferences of individuals where possible and appropriate.
- Pronouns: 1) Recast sentences in the plural: help individuals meet their needs, not help the individual meet his or her needs. 2) Reword sentences to eliminate gender reference altogether: the average person is worried about income, not the average person is worried about his income. 3) Indefinite pronouns: In all but strictly formal uses, plural pronouns have become acceptable substitutes for the masculine singular. Example: "Anyone who wants to go to the game should bring their money", rather than "Anyone who wants to go to the game should bring his or her money".
- ♦ Although "girls" is appropriate for adolescent and younger females, "women" should be used when referring to adults. Similarly, "boys" is appropriate for adolescent and younger males and "men" should be used when referring to adults.

# **Respectful Language**

- Avoid language about persons with disabilities that is demeaning (for example, afflicted, invalid, suffering from).
- Persons with disabilities; not handicapped persons, disabled persons or the disabled.
- ♦ Persons who are homeless; not homeless persons or the homeless.
- Persons who are blind, persons who are deaf; not deaf persons, blind persons, the deaf, the blind
- Persons who have epilepsy, not epileptics.
- Persons with dyslexia; not learning disabled.
- Uses a wheelchair, not wheelchair-bound.
- ♦ Accessible bathroom stall, accessible parking space; not handicapped bathroom stall, disabled bathroom stall, handicapped parking space, disabled parking space.

- ♦ Most disabilities are not a disease. Do not call a person with a disability a "patient" unless referring to a hospital setting. In a human services context, "client" is preferred.
- Some diseases, by legal definition, are considered disabilities. Victimization imagery ("AIDS victims") or defining the person by the disease ("she is a diabetic") is inappropriate. Use "person with diabetes" or "persons living with AIDS."
- "Blind" refers to total loss of eyesight; low vision or visual impairment is more accurate for individuals who have some degree of sight.
- For persons with speech disabilities, avoid mute or speech impediment.
- ♦ Avoid deformed, deformity and birth defect. A person may be "born without arms" or "has a congenital disability," but is probably not defective.
- ♦ Down syndrome is a chromosomal condition that causes developmental disability. Use "person with Down syndrome."
- Mental disabilities include cognitive, psychiatric and learning disabilities and physical head trauma. Avoid "mentally retarded," "insane," "slow learner," "learning disabled" and "brain damaged."
- ♦ A seizure is an episode caused by a sudden disturbance in the brain. If seizures are recurrent, it is called a seizure disorder. Use "person with epilepsy" or "child with a seizure disorder." Avoid "epileptic," either as a noun or adjective.
- Quadriplegia is a substantial loss of function in all four extremities. Paraplegia is a substantial loss of function in the lower part of the body. Use "person with paraplegia". Avoid "paraplegic" or "quadriplegic" as either a noun or adjective.
- ♦ Indigenous or Native American, rather than Indian or American Indian.
- African American, rather than Black unless that is the preference of a particular agency.
- Hispanic, rather than Latino, Latina, or Latinx unless that is the preference of a particular agency.
- ♦ Sexual orientation, rather than sexual preference.
- Transgender, rather than transsexual or transgendered.

### Numerals

 Use figures rather than words when the number refers to a date, the time of day, an age, a percentage or money.

- Use figures when there is a range of numbers (for example, children age 8 to 15).
- ♦ In all other cases, spell out numbers one through nine and use figures for 10 and above.
- Never begin a sentence with a figure unless it is a year.
- Hyphenate the adjectival form (for example, the 10-year old boy; it was a five-day course).
- ♦ In a series, follow the above rules: They had 10 dogs, six cats and 97 hamsters; They had four four-room houses, 10 three-room houses and 12 10-room houses.
- When using the ordinal form of the number, spell out first through ninth and use figures starting with 10<sup>th</sup> (for example, "first", "third", "11th", "20th").

## **Punctuation**

- ♦ In a series, use commas to separate words in the series including for the final "and" ("the dinner includes soup, a main course, and dessert"). The only exception is if the final pair of words are a natural conjunction in which case the comma would be confusing.
- ♦ Be aware of compound sentence punctuation and wording. Use "and" or the appropriate equivalent word and a comma or semi-colon between the two parts of a compound sentence when the first part of the sentence contains several elements that are connected with "and" or an equivalent. Examples: "Program provides food and shelter, and assists individuals who need health referrals." OR "Program provides food, shelter and clothing; and assists individuals who need health, family planning and employment referrals." NOT "Program provides food, shelter and assists individuals who need health referrals."
- ♦ Hyphenation Rule: generally speaking, hyphenate two words when two words are used as one and the compound word is an adjective.

# **Appendix B: Preferred Spellings**

case-by-case [as adjective]

child care

childbirth

Aboriginal [generally use Indigenous classroom unless agency has preference] clean up [verb] adult day program [not adult day care] clean-up [noun] African American clearinghouse after school [someone may stay after co-directors school but after-school program] coeducational aftercare co-op but cooperative also known as [avoid 'aka' in descriptive co-owner textl co-pay Alzheimer's Disease co-payment American Indian [use Native American] co-signer American Sign Language [initial caps] co-sponsor analyze community-based and/or [but try to avoid using] consumer/survivor anti-racism Convention refugees cooperation Asian American assistive devices [assistive technology coordinate equipment in the Taxonomy; preference countywide is assistive technology] co-workers audiovisual crosscultural babysitter database backup day care [refers to older adults or similar situations. barrier free [the home is barrier free but This is not a synonym for child care] barrier-free home] daytime deaf-blind biannual Bible [use for the book only, capitalized] decision-making biblical [lower case] dependent bicultural detoxification bilingual dietitian [not dietician] birth weight door-to-door service but go door to door birthrate downtown bisexual drop in to apply [verb] **Braille** drop-in center [noun] breastfeed dropdown build up [verb] but build-up [noun and drop out [verb] adjective] dropout [noun] bylaws byproduct Elders [as in Native Elders] elderly [use older adults] cannot [always one word] email cardiopulmonary resuscitation (CPR) [use ensure [preferred to insure when meaning a phrase with acronym, as above] guarantee; insure for insurance] caregiver ex-inmates [rule: use hyphen when ex means

former; use no hyphen when ex means out of]

ex-offenders

ex-residents

eyeglasses home sharing homebound [prefer: persons with limited ability to eye to eye [see eye to eye] eye-to-eye [eye-to-eye confrontation] leave home. Avoid shut-ins] eyewitness homelike homemaker service face to face [face-to-face should be like homemaking door-to-door on both, use hyphens honorarium when used as a modifier: face-to-face honorary meeting but meeting face to face] honor family oriented hosteling farther [refers to physical distance hotel style [hotel-style if a modifier] whereas further is an extension in time hotline household or degree] fee-for-service firsthand Indigenous [always capitalize] focused in-depth [in-depth conversation but talking in depth] for-profit in-home in-house follow-up [noun] follow up [verb] in-service francophone [do not capitalize] inpatient free of charge inquiry [never enquiry] full-time job [works full time but fullinteragency time job] intercity fundraiser Internet [capitalize] fundraising interstate intervenors gender [rather than sex] intranet geographic [not geographical] job-ready group home iob seekers hair care half-hour kick off [verb] half time [works half time but half-time kickoff [noun] know-how [noun] job, same with part time] halfway halfway house laid off hands-on [hands-on work but prefers to laid-off workers Latino/Latina/Latinx [generally use Hispanic unless work hands on, same with hands-off, hands off] agency has preference] health care layoff helpline life skills high school lifelong Hispanic [generally preferred over Latino] live-in staff historic [important, stands out in history] login historical [happened in the past] logoff HIV/AIDS logon HIV test long distance [go a long distance] home-based long-distance [long-distance calls] home care long range home help long-term housing home page low cost [meals at a low cost but low-cost housing]

low-income pain relieving drugs lunchtime paperwork

parent-teacher associations

meals on wheels part time [works part time]
Midwest part-time job

more than [rather than over] pediatric multidisciplinary percent

multicultural physiotherapy [never physio]

multilanguage postcoronary
multilingual postgraduate
multiservice postnatal
postoperation
nationwide postpartum

nationwide postpartum
Native American postsecondary
non Tuse byphen if a yowel follows postwar

non... [use hyphen if a vowel follows, postwar otherwise treat as one word] preadmission noncustodial precondition

nondenominational pre-employment nongovernmental premarital nonmedical prenatal non-offending pre-operative nonperishable preplanning nonprofit prerelease nonresidential preretirement nonsectarian preschool

North American Native pretrial northeast preventive northwest [unless "the Northwest"] private home

pro-business odd jobs pro-labor

off peak pro-life
off-site facilities [but: facilities off site] programing

on hand provide services for [rather than provide services to] on premises psychogeriatric

reapply recognize

on-site facilities [but: facilities on site] psychosocial

on-the-job-training

but one-bedroom house]

one bedroom [house has one bedroom

one-on-one recur
one-time recurring
one-to-one redevelopment
ongoing re-entering

ongoing re-entering
online re-establishment
orthopedic reintegration
orthotic relocate

out of town [going out of town but out- resume [not resumé or résumé]

of-town newspaper] retraining
outpatient right-to-life
overall right-to-work

overeaters override school-age children school-based self care self contained self-defense self-government self help group [use mutual support group] self improvement self managed self referral seniors [use older adults] sexual assault [not rape] set up [verb] setup [noun] sexually transmitted diseases short-range short-term shut-ins [try to avoid... alternative: persons with limited ability to leave home] shut off [verb] shut-off notice sick room sign interpreters sign up [verb] sign-up sheet sizable [not sizeable] skill training 65 years and older [not and up or and over or and above]; also age 18 and younger [not and under or and below] social service agencies software sole support southeast southwest [unless "the Southwest"] spinal cord injury spring [never capitalize] staff are [not staff is] stand out [verb] standout [noun] start-up stepfather stepmother stepparent subcommittee summer

12-step tax-exempt

toll-free line [but call toll free] toward [not towards] tradesperson transgender 24-hour emergency service underemployed

United States
Vice President
voicemail

volunteer-based

unemployed

walk in to register walk-in medical clinic

website well-being weekdays weekend

wheelchair accessible wheel-in shower widespread workplace workplan

work-related organizations

workshop worksite worldwide

x-ray

year-round activities [but: operates year round]

ZIP code [capitalize ZIP, lowercase code; ZIP stands for Zone Improvement Program]

# Appendix C: Preferred Language Spellings and Choices

The following list of languages is intended as a helpful guide and although very extensive, does not pretend to be a definitive resource. However, it is intended to encourage consistency across I&R resource databases (for example, opting for Filipino as opposed to Pilipino or Tagalog). Particularly with regard to some of the languages that are less spoken in North America, there are often alternative spellings and dialect issues that cannot be resolved here. We encourage you to verify other languages through <a href="www.wikipedia.org">www.wikipedia.org</a>. Please alert us to languages that should be added to this list.

Adangme (spoken in west Africa)

Adaptive American Sign Language (used by persons who are deaf-blind)

**Afar** (official literary language in Ethiopia, close to but distinct from Saho)

Afghan see Pashto

**Afrikaans** 

Akan (spoken in west Africa)

**Albanian** 

American Sign Language see also Signed English

Amharic (spoken in Ethiopia)

Arabic

**Armenian** 

Assamese (spoken in India)

**Assyrian** (related to Aramaic, spoken by Christians in Iran, Iraq, Syria, Turkey)

Awngi (spoken in Ethiopia)

Azerbaijani (spoken in northern Iran and Azerbaijan; the people are known as Azeris)

Azeri see Azerbaijani

Bahasa see Indonesian

Bajuni see **Swahili** 

**Baluchi** (variant spelling: Balochi)

Bambara (spoken in west Africa)

**Bana** (spoken in Cameroon)

Bangla see Bengali

**Bari** (spoken in Sudan)

**Belarusian** 

Bemba (spoken in Zambia)

Bengali (spoken in Bangladesh and India)

Bini see Edo

**Bliss Symbols** 

**Bosnian** 

**Braille** 

Brava see Swahili (Brava)

**Bulgarian** 

**Burmese** 

## Cajun French

Cambodian see Khmer

Cantonese see Chinese (Cantonese)

Caribbean dialects see French Creole, Spanish Creole, West Indian dialects

**Cebuano** (spoken in the Philippines)

Cheyanne (North American Aboriginal)

Chaldean see Assyrian

**Cham** (spoken in Vietnam and Cambodia)

**Chamorro** (spoken in Guam and Northern Mariana Islands)

**Chinese** (put dialects in brackets; for example Chinese (Mandarin). Written Chinese is just "Chinese" – dialects are orally distinct)

#### Cantonese

Hakka (also known as Kan-Hakka)

Mandarin (official spoken language of People's Republic of China)

**Mien** (spoken in China and Vietnam)

Shanghainese

**Taishan** (variant spellings: Toisan, Toishan, Toishanese)

**Taiwanese** 

Wu

**Choctaw** (North American Aboriginal)

Chipeywan (North American Aboriginal)

**Cree** (North American Aboriginal)

Creole see French Creole, Krio, Spanish Creole, West Indian dialects

Creole Arabic see Juba Arabic

**Croatian** (same language as Serbian, but written in Roman alphabet)

Czech

Czechoslovakian see Czech, Slovak

#### Danish

**Dari** (a distinct dialect of Farsi spoken in Afghanistan)

**Dinka** (spoken in Sudan)

**Dogrib** (North American Aboriginal)

**Dutch** 

**Edo** (spoken in Nigeria)

Efik (spoken in Nigeria)

Egyptian Arabic see **Arabic** 

#### **English**

Eritrean see Tigre or Tigrinya

### **Esperanto**

#### **Estonian**

Ethiopian languages see Afar, Amharic, Harari, Nuer

**Ewe** (spoken in west Africa)

## **Facilitated Communication**

Fanti (spoken in Ghana; dialect of Akan)

Farsi (spoken in Iran)

**Fijian** 

**Filipino** (spoken in the Philippines; incorporates dialects including Tagalog)

**Finger Spelling** (used by persons who are deaf-blind)

**Finnish** 

Flemish see Dutch

French

**French Creole** 

French Sign Language

Fujian see Chinese (Fujian)

Fukien see Chinese (Fujian)

**Ga** (spoken in west Africa)

Gaelic (use for Scots Gaelic; for Irish Gaelic use Irish)

Galla see Oromo

Ganda (spoken in Tanzania and Uganda)

Georgian (spoken in Georgia)

German

Gikuyu (spoken in east Africa)

Greek

Gujarati (spoken in India; variant spelling is Gujurati)

**Gwich'in** (North American Aboriginal)

Hakka see Chinese (Hakka)

Hand over Hand Sign Language (used by persons who are deaf-blind)

**Harari** (spoken in Ethiopia)

Hausa (spoken in west Africa)

Hawaiian

**Hebrew** 

**Herero** (spoken in southern Africa)

**Hindi** (spoken in India)

**Hindko** (spoken in Pakistan)

Hokkien see Chinese (Fujian)

Hottentot see Nama

**Hmong** 

Hungarian

**Ibo** (spoken in west Africa)

**Icelandic** 

Igbo see Ibo

**Ilocano** (spoken in the Philippines)

Indonesian (national language of Indonesia)

**Innu** (North American Aboriginal)

Inuinnaqtun (Inuit language)

Inuit see Inuktitut

Inuktitut (Inuit language)

Inupiak see Inuktitut

Inuvialuktun (Inuit language)

Iranian see Farsi, Kurdish, Pashto

Iraqi Arabic see Arabic

**Irish** (use for Gaelic Irish)

Isoko (spoken in Nigeria)

Italian

### **Japanese**

Jewish – do not use, see Hebrew, Yiddish

**Juba Arabic** (spoken in Sudan)

Kachchi (South Asian language)

Kanarese see Kannada

Kannada (spoken in India)

**Kapampangan** (spoken in the Philippines)

**Kashmiri** (spoken in India and Pakistan)

Kerala see Malayalam

Khmer (spoken in Vietnam, Cambodia)

Khmu (spoken in Laos)

Kikuyu see **Gikuyu** 

Kinyarwanda (spoken in Zaire and Rwanda)

Kirundi see **Rundi** 

Kiswahili see Swahili

Konkani (spoken in India)

Korean

Kmhmu see Khmu

**Krio** (spoken in Sierra Leone)

**Kurdish** (spoken in parts of Iran, Iraq, Turkey, Afghanistan, Russia, Syria)

Kutchi see Kachchi

**Ladino** (spoken in Israel)

Lao see Laotian

Laotian

Latvian

Lebanese Arabic see Arabic

Lenje (spoken in Zambia)

**Lingala** (spoken in central Africa)

Lithuanian

**Luba-Kasai** (spoken in central Africa)

**Luba-Shaba** (spoken in central Africa)

Luganda see Ganda

**Luo** (spoken in Kenya)

Maay see Somali (May May)

Macedonian

Malay (spoken in Malaysia, Thailand, Singapore)

Malayalam (spoken in India)

Maltese

Mandarin see Chinese (Mandarin)

Mandingo (spoken in Gambia, Guinea, Liberia, Senegal)

Mandinka see Mandingo

Maninka see Mandingo

Manya see Mandingo

Marathi (spoken in India)

Matabele see Ndebele

May-May (a dialect of Somali) see Somali (May May)

Mende (spoken in Liberia and Sierra Leone)

Micmac see Mi'kmaq

Mi'kmaq (North American Aboriginal)

Min see Chinese (Fujian)

Mohawk (North American Aboriginal)

Mong see **Hmong** 

Mongolian

Navajo (North American Aboriginal)

Ndebele (spoken in southern Africa; dialect of Zulu)

Neo-Syriac see Assyrian

Nepalese see Nepali

Nepali (spoken in Bhutan, India, Nepal)

Nigerian languages see Hausa, Ibo, Yoruba

North Slavey (North American Aboriginal)

Norwegian

**Nuer** (spoken in Sudan and Ethiopia)

**Odawa** (North American Aboriginal)

**Oji-Cree** (North American Aboriginal)

**Ojibway** (North American Aboriginal – also known as Ojibwe, Ojibwa)

**Oneida** (North American Aboriginal)

Oriya (spoken in India)

Oromiffa see Oromo

**Oromo** (spoken in Ethiopia and Kenya; formerly called Galla)

Oromonia see Oromo

Orya see Oriya

Ouolof see Wolof

Pampangan see Kapampangan

Pangasinan (spoken in the Philippines)

Panjabi see Punjabi

**Pashto** (official language of Afghanistan)

Pashtu see Pashto

Pasthun see Pashto

Patois see West Indian dialects

Persian see Farsi

**Picture Boards** 

Pilipino see Filipino

**Polish** 

**Portuguese** 

**Portuguese Creole** 

**Powhatan** (North American Aboriginal)

**Punjabi** (spoken in Pakistan and India)

Pushto see Pashto

**Quechua** (spoken in South America)

Quiché (spoken in Guatemala, main Mayan language)

**Romani** (language of the Roma)

Romanian (variant spelling: Rumanian)

**Romansch** (one of Switzerland's four official languages)

Romany see Romani

Ruanda see Kinyarwanda

Rundi (national language of Burundi)

Russian

**Saho** (spoken in Eritrea, close to but distinct from Afar)

Samoan

Scots Gaelic see Gaelic

**Serbian** (same as Croatian, but written in Cyrillic alphabet)

Serbo-Croatian see Croatian, Serbian

Setswana see Tswana

**Shona** (spoken in Africa; in Bantu family)

Sign Language see American Sign Language, French Sign Language

**Signed English** (used by deaf students in the Canadian education system)

Sindhi (spoken in Pakistan and India)

Sinhala (spoken in Singapore and Sri Lanka)

Sinhalese see Sinhala

Slovak

Slovene see Slovenian

Slovenian

Somali

Somali (May May)

**Sotho** (spoken in southern Africa)

South Pacific Pidgin see Tok Pisin

**South Slavey** (North American Aboriginal)

Spanish

**Spanish Creole** 

Sri Lankan see Sinhala, Tamil

**Swahili** (spoken in east Africa)

# Swahili (Brava)

**Swedish** 

**Tactile Signage** (used by persons who are deaf-blind)

Tagalog see Filipino

Tai Shan see Chinese (Taishan)

Taiwanese see Chinese (Taiwanese)

**Tamil** (spoken in India and Sri Lanka)

**Telugu** (spoken in India)

**Temne** (spoken in Sierra Leone, Africa)

Thai

**Tibetan** 

Tien-chow see Chinese (Tieuchow)

Tieuchow see Chinese (Tieuchow)

**Tigre** (spoken in Eritrea, distinct from Tigrinya)

Tigrigna see Tigrinya

**Tigrinya** (official language of Eritrea, distinct from Tigre – also known as Tigrigna, Tigrinia)

Tlicho see Gwich'in

Toisan see Chinese (Taishan)

Tok Pisin (also known as South Pacific Pidgin; official language of Papua New Guinea)

**Tongan** 

**Touch-Hand Language** (used by persons who are deaf-blind)

**Tswana** (spoken in southern Africa)

**Tulu** (spoken in India)

**Turkish** 

Twi (spoken in Africa; dialect of Akan)

**Two-Hand Manual** 

## Ukrainian

**Urdu** (official language of Pakistan; also spoken in India)

**Urhobo** (spoken in west Africa)

### Vietnamese

#### Welsh

West Indian dialects see also French Creole, Spanish Creole (use for English dialects)

**Wolof** (spoken in Senegal)

Wu see Chinese (Wu)

**Xhosa** (spoken in southern Africa)

#### **Yiddish**

Yoruba (spoken in west Africa)

Yugoslavian see Bosnian, Croatian, Macedonian, Serbian, Slovenian

Zulu (spoken in southern Africa)

# Appendix D: Official Post Office Abbreviations

## **States and Territories**

ME Maine

AK Alaska NM New Mexico AL Alabama NV Nevada AR Arkansas NY New York

AS American Samoa OH Ohio

AZ Arizona **OK Oklahoma** CA California OR Oregon CO Colorado PA Pennsylvania CT Connecticut PR Puerto Rico

DC District of Columbia PW Palau

DE Delaware RI Rhode Island FL Florida SC South Carolina FM Federated States of Micronesia SD South Dakota

TN Tennessee **GA** Georgia **GU Guam** TX Texas HI Hawaii **UT Utah** IA Iowa **VA Virginia** 

**ID Idaho** VI United States Virgin Islands

IL Illinois **VT Vermont** IN Indiana **WA Washington KS Kansas** WI Wisconsin **KY Kentucky** WV West Virginia WY Wyoming LA Louisiana

MA Massachusetts

MD Maryland **Canadian Provinces and Territories** 

MH Marshall Islands AB Alberta

MI Michigan BC British Columbia MN Minnesota MB Manitoba **NB New Brunswick** MO Missouri

MP Northern Mariana Islands NL Newfoundland and Labrador

NS Nova Scotia MS Mississippi **NT Northwest Territories** MT Montana

NC North Carolina **NU Nunavut** ND North Dakota ON Ontario

PE Prince Edward Island NE Nebraska

**NH New Hampshire** QC Quebec SK Saskatchewan NJ New Jersey

YT Yukon

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