

## IN211 Database Plan—"D-Bugged"<sup>1</sup> Adopted the Board, 9/12/06

### VISION

IN211 and its Centers will be viewed and supported as the expert in human services information, needs, and gaps in services. The core of the IN211 system is an integrated comprehensive database of human services in the state, as developed and maintained through true partnership with local 2-1-1 Centers and key database partners. The human services database will both serve the entire IN211 system and be easily accessible to the public through the Internet.

### Benefits

- Access to human services information statewide 24/7, allowing IN211 Centers to connect callers to services outside their service area for mis-routed 2-1-1 and after-hours calls;
- Complete system-wide redundancy in case of disaster or emergency, allowing any Center—including a temporary disaster Center—to accept and handle calls from any other;
- A single statewide website that will make available over the Internet the most useful information about services; and,
- A more efficient and effective way to collect and update information about services available from regional, statewide and national providers, reducing duplication of effort for the IN211 system as well as human service providers who are asked to verify information.

### Achieving the Vision for IN211 Statewide Database

In March 2001, Indiana 211 Partnership (IN211) adopted a plan for 2-1-1 development and implementation in Indiana. In its first five years, IN211 pragmatically adapted the implementation to reflect resources and limitations. The IN211 Board approved Standards, Policies and guiding principles. The Center Roundtable and database partners implemented common database field structure to improve data exchange. The IN211 Evaluation reports in 2004 and 2005 highlighted progress to date, as well as specific areas for improvement.

Recognizing that the database affects and is affected by the work of several committees and sub-committees, the IN211 Board charged an ad hoc committee to develop a new comprehensive database plan—one that would address both the strategic direction and the operational work. The "ad hoc" database committee explored alternatives to resolve the most difficult issues in shared database systems, including duplication of records, data consistency and proprietary issues. What follows may be considered the "updated database plan," or as some refer to it, the "IN211 Database Plan-D-Bugged."

The timelines reveal a sense of urgency, which is related directly to the day-to-day needs of operating 2-1-1 24 hours a day, serving out-of-area calls because of unavoidable 2-1-1 routing, disaster preparedness, and holiday coverage, which will be shared among Centers for the first time in 2006.

### FEATURES OF THE IN211 DATABASE

The IN211 Database Plan includes both for the Resource Database from which referrals are made and the Caller Database for which non-identifying confidential demographic and need information is aggregated for reporting and planning purposes. The IN211 Database Plan includes the following features.

#### **Standards-based – focus on maintaining high quality**

All databases in the system are maintained in accordance with the national and state Standards to ensure highest quality of the data. Requirements include

- Adherence to *Standards for Professional Information & Referral*, the IN211 Center Operations Manual, ethics and applicable laws.

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<sup>1</sup> "D-Bug" = Database Users Group, a term shamelessly stolen from colleagues in Virginia. The IN211 Database Managers Group is comprised of database managers and other staff responsible for maintaining resource data. This group is inclusive of staff of all IN211 Centers and their key database partners from Area Agencies on Aging, public libraries and other data partners. The group has met regularly via conference call (and online meeting) since 2003.

- Mandatory data elements for resource records beyond basic contact information, including intake requirements, hours of operations, that help connect the consumer with the most appropriate resource to meet specific needs
- Accurate and up-to-date information about human services, as evident by annual updates and verification quality assurance measures
- Indexing using AIRS INFOLINE Taxonomy consistently within IN211 Centers and key data partners
- Maintained by trained staff through initial and ongoing training, with 75% certified when eligible

#### **User-friendly – focus on connecting people with needs to services**

- For the 2-1-1/I&R professionals, using the statewide database will be fast and searchable via multiple search methods.
- For the public, the statewide database will include fast and easy searches from multiple types of searches (geographic-based, keywords, Google-able/Boolean search). Mapping and e-mailing of services will be offered through the Internet based search.
- The statewide database will include “tips” for how to use services, particularly for frequently requested services, disaster response and/or complicated services.
- IN211 seeks to make the online statewide database searchable and usable for people with disabilities and for non-English speakers.

#### **Locally-driven – focus on integrated system with interdependence between Centers and IN211**

- Information about human services is collected and updated as close to the community source as possible. Thus, the statewide database will be fed by the local IN211 centers as they update their own databases. IN211 Database managers will be responsible for collecting resource information from state agencies and national hotlines and downloading it to the call centers.
- Local options and preferences (custom fields, search options, special campaigns) will be preserved wherever feasible.
- Centers will retain proprietary rights and uses to serve their local needs. In addition to the statewide online database, Centers may maintain their local database online, publish print or electronic directories, and/or create guides to services for use in local service area.

#### **Cost efficient and cost-effective<sup>2</sup> – focus on maximizing resources for most outcomes**

- Increased efficiency and effectiveness by centralizing functions where helpful and more cost efficient to local Centers.
- Increased efficiency and effectiveness in collecting and updating information about services available from regional, statewide and national providers. Reduces duplication of effort for the IN211 system as well as human service providers who are asked to verify information.
- Increased efficiency and effectiveness of staffing by segmenting staff into two groups: 1) a few highly trained resource database experts responsible for indexing, policies, procedures and reporting for the system (with lead staff paid by IN211), and 2) one designee at each Center or database partner responsible for local relationships, maintenance of local resource records, and integration with system.
- Recognizing that staff turnover costs money and time, IN211 and its Centers seek to recruit, train and retain highly trained and specialized staff. Staff should be viewed as team members in I&R/2-1-1 success and thus should be compensated fairly (requiring increases throughout system).

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<sup>2</sup> Research of other statewide 2-1-1 and database systems found that IN211 already has many cost efficiencies in its model. The National Cost-Benefit Analysis determined that IN211’s model of centralized administration, decentralized service delivery produces a net benefit and is one of the best models. In a telephone survey, other states remarked that “use of a common I&R software” makes the database work more efficient. (Interviewers asked “if you could start over, what would you do differently?”)

**Work Plan**

- The full DB Managers group uses task groups to explore alternatives and propose solutions:
  - Ad Hoc DB Committee, charged to coordinate the work of multiple task groups into a single integrated plan;
  - "Division of Labor," charged with resolving issues related to sharing data in a statewide database, including duplication of records and proprietary issues;
  - Training, in partnership with AIRS-IN and full DB Managers, charged to develop practical database instructions and training materials; and
  - Style Guide, charged with defining the content and style for data elements, clarifying definitions and drafting the Style Guide (which improves consistency and searchability).
- The grid below provides an overview of the outcomes. *The full detail of activities and inter-dependencies is outlined in a separate timeline.*

**Primary Outcomes and Timelines, as of 9/12/06**

TIME	Outcome	Completed
2005-2006	<ul style="list-style-type: none"> <li>• Common I&amp;R Software, with all Centers and Partners on same version (7/05)</li> <li>• Standardized GeoStructure used statewide (completed 2005)</li> <li>• Standardized Keyword List (available online) (completed 2005, updated 4/06)</li> <li>• Software scriptfiles developed for 1) "no geo overwrite"; 2) "no export local keywords"</li> <li>• Standardized Data Elements and Field assignments in Caller Record</li> <li>• Standardized Data Elements in Resource Record</li> <li>• Customized Taxonomy Term and Definition for indexing Township Trustees (2005)</li> </ul>	✓
3 <sup>rd</sup> Q Aug-Sep, 2006	Complete assignments of maintenance of responsibilities for "duplicated records"	✓ 8/18/06
	Work Plan drafted, with Task Groups, Assignments and Timelines for completion	✓ 8/18/06
	Board adopts IN211 Database Plan	
	1 <sup>st</sup> Draft Style Guide with Definitions for Required Resource Data Elements	
4 <sup>th</sup> Q Oct-Dec, 2006	Board reviews Inclusion Policy and implements Taxonomy Policy	
	Board adopts DB Maintenance Assignments	
1 <sup>st</sup> Q Jan-Mar 2007	Initial sections of Taxonomy Customization determined	
2 <sup>nd</sup> Q Apr-Jun 2007		
3 <sup>rd</sup> Q Jul-Sep 2007	Full functioning statewide dream database available in house and to public online (pending funding)	

**Key related documents include the following:**

- Prior DB Committee Reports to the Board
- Policies in IN211 Operations Manual
  - Database Inclusion Policy, adopted 9/10/02
  - Standard Required Data Elements and Process Measures, adopted 7/9/02 (regarding elements for inclusion and updates)
  - Standardization of Resource Database, adopted 5/9/06 (regarding geostructure, keywords, attachments to program records, and use of AIRS INFOLINE Taxonomy)
  - Quality Assurance for Resource Database Updates, adopted 5/9/06
  - Data Reporting Policy, adopted 1/14/03, updated 5/9/06
- Timeline for DB Managers, Task Groups and Centers
- DB Managers Contact list
- Standardized Keyword list
- IN211 geostructure and Map of Area Agencies on Aging regions

## **OPERATIONAL ISSUES, TASKS AND TIMELINE**

IN211 researched and identified alternatives to resolve recurring issues related to database consistency, duplication of records, and proprietary rights/uses.

### **Work completed to date**

- Common I&R Software (Iris 3.0 by Suncoast) used in all IN211 Centers, Area Agencies on Aging, and key data partners including Lake County Public Library, Information Link of Southern Indiana and Healthy Communities of LaPorte County
- Standardized GeoStructure used statewide in all IN211 Centers, Area Agencies on Aging and key database partners (available online)
- Standardized Keyword List available for use statewide in all IN211 Centers, Area Agencies on Aging and key database partners (available online)
- Software scriptfiles developed for 1) "no geo overwrite" on import for IN-KY relationship; 2) "no export local keywords" for keeping local keywords out of statewide database
- Standardized Data Elements, Fields assignments in Caller Record, including definitions of each.
- Standardized Data Elements in Resource Record
- Customized Taxonomy Term and Definition for indexing Township Trustees

### **Currently in progress – see chart of timeline with tasks**

- Assignment of regional, state and national organization updates responsibilities
- Adoption of "Do Not Export" data element in Resource files, in connection with assignment of update responsibilities
- IN211 Style Guide, including required fields and formatting, as well as recommendations for new Resource Managers.
- Password protected access for IN211 Centers to statewide resource database in current form
- Training for Resource Database Managers
- Funding request(s) to support public access to statewide database online

### **Future Projects**

- Public access to searchable online resource database (look of NJ211, search options of TX211)
- Full Taxonomy Customization and new subscription method with INFOLINE
- Standardized Needs List for caller records and related training
- I&R software replacement
- Automated data verification process
- Centralizing functions where more cost efficient to local Centers
- Possible collaboration or integration with other systems, such as HMIS, CAN, state eligibility programs, etc.
- Possible integration of I&R software with ACD/telephony system