

## **Countywide Resource Inventory Protocols**

### **Proposed by the Community Resource Inventory Committee**

#### **Who must participate and at what level of information**

- **Who must participate and submit accurate and complete information:**  
Service Provider Agencies receiving any public and/or United Way funding  
Agencies/entities providing public funding and/or distributing public funds to service provider agencies.
- **Voluntary Participation**  
Agencies that are not publicly supported are encouraged to participate

Participating agencies will be offered copies of or access to reports generated from the CRI.

#### **First Call For Help (FCFH) use of information**

- Helpline Counselors will have no access to sensitive CRI information in the FCFH call management database. Information Services staff will have password protected access to this information.
- Specific funding details will not be used for Information & Referral purposes.
- Funding details will not be included in directories.
- FCFH will not give out funding information from profiles on a specific provider when requested from another provider or funder. They will be directed to call the agency directly.

#### **Protocols for how the service and funding information should be used**

- The information contained in the Community Resource Inventory is designed to be used to enhance planning and decision-making regarding the allocation of service delivery resources and the funding which supports those services to most effectively meet the identified health and social service needs of the residents of Broward County, FL.
- Service information should be used to identify the availability of specific types or variables of services in the county at large and in targeted communities or populations.
- Service information should be used to identify gaps and overlaps in services.
- The information in the CRI is not to be used for purposes of creating printed or electronic directories or populating databases for purposes which duplicate or compete with FCFH's information services or products.
- Use of funding information should focus on identifying and making decisions about the financial allocation of resources to programs and services in relationship to needs, gaps and overlaps.
- Funders and service providers will have access to reports generated from the Community Resource Inventory (CRI) to assist their decision-making, program planning, and communication efforts.
- Utilization of funding and service information will be monitored for adherence to the Community Resource Inventory Guiding Principles and Protocols and observance of locally accepted standards for sound and effective decision-making. Misuse of this information will be brought to the attention of the CCB.

#### **Protocols for how and with whom the raw data tables will be shared**

- The full data set will be made available to CCB members and the CRI committee only. Exceptions must be approved by the CRI Committee.
- CRI committee members will have access (upon request) to the data for quality and consistency review purposes only. Committee members may not release this information to others.
- The CCB data set will be made available to CCB member agencies after its release, upon return of a written request/release form.
- The CRI database distributed to CCB members is intended to be used for internal planning and decision-making processes and may not be redistributed.

- CCB and CRIC members must agree not to use this information for purposes of creating printed or electronic directories or populating other databases for purposes which duplicate or compete with FCFH's information services or products.

#### **Protocols for requests for and receipt of standardized CCB report sets**

- FCFH will provide the CCB office with standard sets of reports upon CRI committee review and release.
- Requests for printed reports should be made in writing on a request/release form to the CCB office which will provide them to the requestor.
- The requestor must agree not to use this information for purposes of creating printed or electronic directories or populating other databases for purposes which duplicate or compete with FCFH's information services or products.

#### **Protocols for CCB members requesting non-standardized printed reports of CCB data**

- FCFH will respond to these requests on a first-come, time available basis at a cost to the CCB member agency.
- First Call will charge for its database/information services at its usual and customary rate. An estimate will be given prior to the beginning of the project.
- The request must be made in writing and be authorized by the CCB member representative or his/her designee. The written request must specifically identify the data fields desired in the final report and the specific taxonomy codes to be filtered. If the requestor does not have a copy of the taxonomy available, FCFH will provide access to use of its book in the FCFH office.
- The requestor must agree not to use this information for purposes of creating printed or electronic directories or populating other databases for purposes which duplicate or compete with FCFH's information services or products.

#### **Protocols for CCB members requesting reports from the full FCFH database**

- FCFH will respond to these requests on a first come, time available basis at a cost to the CCB member agency.
- First Call will charge for its database/information services at its usual and customary rate. An estimate will be given prior to the beginning of the project. If the report is an expanded version of a pre-formatted CRI report, the CCB member will benefit from reduced costs because the majority of the programming may already be completed.
- The request must be made in writing and be authorized by the CCB member representative or his/her designee. It must specifically identify the data fields desired in the final report and the specific taxonomy codes to be filtered. If the requestor does not have a copy of the taxonomy available, FCFH will provide access to use of its book in the FCFH office.
- The requestor must agree not to use this information for purposes of creating printed or electronic directories or populating other databases for purposes which duplicate or compete with FCFH's information services or products.

#### **Protocols for non-CCB members requesting non-standardized reports of CCB and/or FCFH data**

- First Call will not release full data sets to non-CCB members without prior approval by the CCB.
- FCFH will not release funding data unless it is in an aggregate format which does not identify a particular agency's specific funding sources.
- FCFH will respond to these requests on a first come, time available basis at a cost to the requestor.
- First Call will charge for its database/information services at its usual and customary rate. An estimate will be given prior to the beginning of the project. If the report is an expanded version of a pre-formatted CRI report, the requestor will benefit from reduced hourly costs because the majority of the programming may already be completed.
- The request must be made in writing and include the purpose for which the information will be used. It must specifically identify the data fields desired in the final report and the specific

taxonomy codes to be filtered. If the requestor does not have a copy of the taxonomy available, FCFH will provide access to use of its book in the FCFH office.

- The requestor must agree not to use this information for purposes of creating printed or electronic directories or populating other databases for purposes which duplicate or compete with FCFH's information services or products.