



Inform USA Accreditation Process – Consultative Phase – Narratives & Documentation – 211 Concho Valley

Each section is hyperlinked for easier navigation.

We have only included screenshots of the supporting documentation because of the size of the attachments, but we will gladly share at your request.

1. Service Delivery

- i. Supporting Documentation (Screenshot)**

2. Cooperative Relationship

- i. Supporting Documentation (Screenshot)**

3. Disaster Preparedness

- i. Supporting Documentation (Screenshot)**

4. Organizational Effectiveness

- i. Supporting Documentation (Screenshot)**

Inform USA Service Delivery Accreditation Requirements

The Consultative Phase Accreditation requirements are verified in two ways:

- documentation submitted by the accreditation applicant
 - Via a Google folder provided; labeled Document SD001, Document SD002, etc.
- via the organization's description on narrative questions
 - identified in this section with the bolded word "Description" after the item

211 Concho Valley responses are in bold throughout document.

#1 - **Overview:** *It is very important for the reviewer to have a good understanding of your I&R service and its place in the community. Provide a description of your organization.*

Please check all that apply, and provide additional details if applicable.

Is it independent or part of a larger organization such as a United Way, a government entity, an Area Agency on Aging or a 211?

Description: Since 2004, the Concho Valley Council of Governments has maintained an Area Information Center, also referred to as 2-1-1 Texas of the Concho Valley, to provide information and referral services to the residents of the Concho Valley region, which consists of 13 rural counties. The 211 I&R program is co-located with the Area Agency on Aging (AAA) and Aging and Disability Resource Center (ADRC), known locally as the CVCOG Access and Assistance (AaA) programs. The primary focus of the 211 I&R program was to become recognized as an accredited program which would acknowledge that 2-1-1 Texas of the Concho Valley meets and adheres to national standards in regard to professionalism, service delivery, data resource management, outreach, disaster preparedness, reports and measures, cooperative relationships, and organizational effectiveness. While the accreditation process is lengthy, detailed, and requires financial investment, CVCOG fully supported this endeavor of the I&R program because it wholly believed that this certificate would lend credibility and gain support in the belief and value of the professional services offered in the field of information and referral services.

Is it a comprehensive I&R, specialized, a crisis line, or a combination?

Description: 211 Texas is part of the Texas Information and Referral Network (TIRN), which is a program of the Texas Health and Human Services Commission (TX HHSC). 211 is a comprehensive I&R which is 1 of 25 regional Area Information Center (AICs) throughout the State of Texas.

What is the annual budget for the agency and the I&R program?

Description: \$194,630 is what is received specifically for 211 Texas of the Concho Valley from the Texas Health and Human Services Commission; this funding covers all operational costs for all staff associated with the 211 program.

What is your coverage (service) area? What is the population census of that area?

Description: 211 of the Concho Valley covers 13 counties, which are predominantly considered Rural. Those counties are: Coke, Concho, Crockett, Irion, Kimble, Mason, McCulloch, Menard, Reagan, Schleicher, Sterling, Sutton, and Tom Green.

The U.S. Census Bureau Quick Facts data as of July 1, 2024 provides the following estimates on population:

Coke: 3,396

Concho: 3,326

Crockett: 2,799

Irion: 1,526

Kimble: 4,401

Mason: 3,987

McCulloch: 7,448

Menard: 1,911

Reagan: 3,139

Schleicher: 2,302

Sterling: 1,387

Sutton: 3,269

Tom Green: 120,103

Total Estimated Population: 158,994

What is your organizational structure (administration, departments, services, etc.) and what services/activities are provided.

Description: 211 Texas of the Concho Valley is co-located with the Area Agency on Aging and Aging (AAA) and Aging and Disability Resource Center (ADRC) for the Concho Valley region. Within the Concho Valley Council of Governments (CVCOG) and locally these 3 programs are referred to as the CVCOG Access and Assistance programs, since the majority of staff are cross-trained amongst 2, if not all 3, programs. The Access and Assistance Director is responsible for oversight of all three programs. Specific to the 211 program, there is also an Operations Manager who serves as Administrative back up to the AaA Director. We have a Resource Manager who is responsible for the database maintenance and serves as the primary Emergency Manager for the program; the Director is certified in all 3 Inform USA certifications so she can also complete database maintenance activities as needed. We have two Information Specialists, whose primary duties are completing call handling activities; one Specialist is full-time in the 211 program, while the other Specialist is cross-trained in AAA and ADRC activities. All staff can complete outreach and awareness activities throughout the year. The Area Agency on Aging focuses on providing services to individuals 60 years of age and older (Seniors/Older Texans) and/or informal caregivers (individuals 18 years of age or older providing unpaid care to loved ones 60 years of age and older). The ADRC services are geared towards Older individuals and individuals with disabilities of any age and informal caregivers to individuals with disabilities or Older Texans. The AAA and ADRC complete person-centered options counseling and case management and serve as more direct services than the 211 program which offers

comprehensive information and referral services to people of all ages, 24/7.

Do you have any contractual agreements for your service provision (e.g., after hours services, or a portion of your database)?

Description: Normal operating hours for 211 Concho Valley are Monday–Friday, 8a.m.–5p.m. After hours coverage is provided by the 211 United Way of Greater Houston; this has been a productive working relationship since 2004. 211 Concho Valley resource information is updated via the statewide resource database with real time updates, not only for Houston, but the rest of the statewide network.

Standard 1: Information, and Referral/Assistance Provision

Call Handling: Inform USA uses the Call Review Phase to evaluate the call handling component of your service (see Standard 1.1).

No response is needed on this item .

#1 (S1) – Please identify which channels of access are provided by your information and referral service (see Standard 1.2):

Phone

email

chatbot

live chat

text

video relay service

social media

website

other alternative access methods___ **Walk-in and by reaching the main phone line through the Concho Valley Council of Governments: 325-944-9666 or 325-223-5704; we also provide resource information when participating in outreach and awareness activities.**

Minimum expectation: At least one additional access channel is available.

#2 (S1) - How does your agency provide access to information about services 24/7 (see Standard 1.3)?

Minimum expectation: People in the community have after-hours access to information about services.

- **Your agency provides live answer, 24/7**
- During business hours your agency provides live-answer, and after-hours redirects to another organization that provides live-answer
 - Please list your hours: **Mon – Fri, 8:00 am – 5:00 pm**
 - Please list the name of the other organization: **after-hours and weekends are covered by United Way of Greater Houston**
- During business hours your agency provides live-answer, and after hours your agency provides (please check this and option below):
 - **direct connection via IVR to another organization**
 - a voice message with the phone number of another organization for assistance
 - a voice message with information about how to access verified online/digital resources

#3 (S1) - Document SD001 (if applicable) - Upload your Memorandum of

Understanding (MOU)/contract/formal agreement with the after-hours provider.

#4 (S1) – Is your service provided at no cost to individuals (i.e. toll-free access is provided to people living within the area served by the I&R). Individuals are responsible for cell phone minutes, landline fees, phone charges, and text charges (see Standard 1.2).

- **Yes**
- No

Description: 211 Texas is a free, confidential number to call to access information and referral services 24/7. If a caller is not able to easily dial 211 from a phone, they have access to the toll-free number, 1-877-541-7905, which connects them to the same call tree that they would receive if they dialed 211. We continue to ask people to report any connectivity issues in dialing 211 from a cell phone or landline so that we can make appropriate notifications to get the problem addressed. We have not seen any significant barriers in recent years with people not being able to dial 211 from a landline or cell phone. Individuals are also able to use the chat feature found on the Texas I&R Network (TIRN) maintained website for 211 Texas. These chats are answered by 211 Texas Information Specialists across the State who are skilled to handle web chats.

#5 (S1) – Describe the steps you have taken to provide barrier free access for your services (see Standard 1.5):

1. Via all telecommunications devices (e.g., wireless providers, or competitive local exchanges).

Minimum expectation: Service is accessible to people using cellular devices and landlines.

Description: TIRN and the Texas Department of Information Resources have been proactive over the years to work with various cell and telephone companies across the state to ensure that each user can access 2-1-1 services. During the early inception of 2-1-1 Texas Concho Valley, not a lot of users could access 2-1-1. The 2-1-1 Manager at the time, communicated with TIRN to advise them of a caller's phone number and wireless/landline carrier to ensure entrance into the network. When conducting outreach events, the public has also been encouraged to test dial 2-1-1 so that the staff could intake any relevant information with barrier issues. When completing presentations we also advise that if anyone ever encounters issues in dial 2-1-1, that they contact 211 Concho Valley staff at the main CVCOG Administrative line to report any difficulties accessing the number. We continue to do test calls and speak about connectivity issues, also advising about the web chat feature, and we have minimal feedback about any barriers.

2. To persons with limited English proficiency.

Minimum expectation: Staff speak the language(s), or they use an interpretation service or interpreters from the community.

Description: English and Spanish are the most prevalent languages spoken in the Concho Valley region. While most callers within the region speak English, there is the migrant and elderly population that are not fluent in English. Since 211 Concho Valley is an integrated network through the Texas Health and Human Services Commission, we also receive roll-over calls from across the state from people that speak a variety of languages. The Texas Information and Referral Network (TIRN) pays for an interpreter service for callers who need access to a variety of other languages. Language Line service is paid for and supplied by the Texas Information and Referral Network; an interpreter can be conferenced into the call seamlessly. 2-1-1 Texas CV staff attend regional health fair events and community meetings and distribute bilingual information. Brochures and flyers are distributed and displayed in Spanish format as well. 211 Concho Valley staff seeks individuals who are bilingual in Spanish, especially for the Information Specialist roles, since Spanish is the second most spoken language in the Concho Valley region.

3. Individuals who are deaf/hard of hearing or those who have speech impairments and need alternative arrangements.
Minimum expectation: The service can be used by these groups without undue inconvenience.

Description: 211 Concho Valley has utilized TTY/TDD machines in the past, however, now callers mainly use 711 Relay Texas Services. Relay Texas is a service that provides telephone access for people with speech or hearing loss who find it challenging or impossible to use a traditional telephone. Relay Texas agents have special equipment to both hear a speaking caller and read text responses sent by callers using a text-based device such as a TTY, VCO, computer or mobile device. The agent facilitates conversations between two callers who are using otherwise incompatible equipment. When processing captioned telephone (CT) calls, agents rely on voice recognition technology to provide the CT user with a text transcript of the call while the CT user is also listening to the other person. All services are available for Texans 24 hours a day, 365 days a year. 211 Concho Valley collaborates with the Texas Department of Assistive and Rehabilitative Services to educate the deaf/hard of hearing community about how to access information and referrals when calling 2-1-1 locally and statewide.

4. Contacts who need/prefer services face-to-face.

Minimum expectation: If you provide services face-to-face, your physical location must be barrier free.

Description: The Concho Valley Council of Governments has designated handicap parking spaces located near the front door. The front entrance has handicap accessible entry. When navigating the building, visitors can conduct business with anyone in any of the meeting rooms barrier free. Each room has space to accommodate anyone with a walker, wheelchair, cane, or motorized scooter and the front doors and doors to the Training Center are handicap accessible, by being opened at the push of a button.

#6 (S1) – The I&R service has a procedure to address challenging interactions, which includes (see Standard 1.7):

- providing options for managing disruptive contacts
- identifying behaviors considered offensive or inappropriate
- reviewing challenging interactions as needed and determining any necessary actions (e.g., procedural changes, staff training)

Description: The following is taken from the 211 Information Specialist Training manual.

Policy: All I&R Specialists will receive training to ensure capability of appropriately handling difficult callers. It is 211 Concho Valley' policy that all callers will be provided resources and referrals.

Procedure: Angry callers can be especially difficult. Remember that they are angry at their situation, not you. Never personalize the caller's anger. Never get into a debate or argument with an angry caller.

These callers may be deemed difficult, but at times these calls can become abusive. Abusive callers will not be tolerated by CVCOG Access and Assistance staff. People may have legitimate reasons to be angry or upset, but there are not legitimate reasons for them to abuse you. Cursing or lewd sexual or racial comments will not be tolerated and the caller will be notified that the call will be terminated immediately. Staff are to immediately report this instance to 211 Resource Manager and 211 Operations Manager and/or Director, via email, and in-person, if staff are readily available.

In order to ensure all difficult callers are handled appropriately, the steps below will be followed:

- 1. 211 staff will remain objective and professional throughout the duration of the call. The specialist will actively listen to the caller's situation without judging or sympathizing. If the call is making you uneasy, put the caller on hold and take a few deep breaths.**
- 2. If the caller continues to make you feel uncomfortable, or you feel you have exhausted all of your resources and they still are not receptive, alert the AIC Director.**
- 3. Be sure and document all aspects of the call. Before transferring any call to the AIC Director, tell them the entire situation. This will ensure that any one else handling the call knows exactly what is going on.**
- 4. Abusive callers will not be tolerated. If a caller is becoming abusive, you have the right to warn the caller that it will not be tolerated. Draw a line and then stick to it. Once you have warned them, if they continue the behavior, you may terminate the call.**

I&R staff are required to document the call as terminated and for what reason. Also, the Director must be alerted so that if the person calls back it can be handled more appropriately than if the Director is unaware. If a difficult caller continues to call in a harassing way the authorities will be notified. TIRN will be notified if this has to occur.

I&R staff are also trained to offer difficult/upset callers with the option to complete a Grievance Form, a method to formally report a concern/complaint. Oftentimes, upset callers ask to speak with a Supervisor during time of call; in these instances, staff are advised to seek assistance via email or from CVCOG phone (while caller is still on the line) and then utilize mute to alert of the need for a Supervisor. The 211 Director and Resource Manager are first options, the AAA Operations Manager is an additional option if 211 management is not readily available. Aside from the immediate option to speak with a supervisor or complete the Grievance process, staff are advised to seek assistance from any other CVCOG Director, including Human Resources, Fiscal, or Executive Director.

#7 (S1) – Document SD002 – Upload your policy and/or procedures for handling transactions via IM/chat, text/SMS messaging or other forms of social media.

#8 (S1) – Document SD003 – Upload your policy and/or procedures for handling simultaneous transactions.

211 Concho Valley staff will not handle multiple, simultaneous transactions. This is noted in the Chat Feature Policy and Procedure.

#9 (S1) – Document SD004 – Upload your Confidentiality policy and/or procedures. The I&R service/organization shall have a policy and/or procedure for ensuring privacy and confidentiality in regards to all channels of access (see Standard 1.6). It should include the following:

- a definition of “confidentiality”
- address any exceptions
- address confidentiality in remote/off-site work settings
- address how permission is obtained and documented
- address confidentiality as it pertains to domestic violence or other endangerment situations
- a review with staff, at least annually

#10 (S1) – Document SD005 – Upload your Personal Identifiable Information (PII) policy and/or procedure. The I&R organization/program shall have a policy and/or procedure to protect Personal Identifiable Information (PII) in regards to all channels of access. It should include the following (see Standard 1.6 and 21.5):

- When technology allows for the collection of identifying information about inquirers without their explicit permission, protect the right of inquirers to privacy and anonymity while preserving community resource specialists’ ability to provide for the individual’s safety should personal identification become necessary.
- In situations where online information can be gathered, relevant legislation is observed and information about individual activities is only made available in aggregate form. Privacy policies are clearly displayed and reflect the general trends in “cyber ethics”.
- Have provisions for protecting and maintaining confidential data collection forms and inquirer information. Organizations outside of the I&R service see only aggregated data.

- If the agency is part of a cooperative service delivery arrangement under which client records are shared, restrict identifying information to those in the collaboration.

#11 (S1) - Document SD006 - Upload the acknowledgement form that is signed by staff agreeing to adherence to the organization's/program's Confidentiality policy/procedure (see Standard 1.6). Do NOT send all the forms your staff have signed!

#12 (S1) - Document SD007 - Upload the Nondisclosure form signed by visitors that may access confidential information (see Standard 1.6).

Standard 2: Client Advocacy

#1 (S2) - Document SD008 - Upload your Advocacy policy and/or procedures (see Standard 2.1).

Minimum expectation: The policy/procedures must include:

- circumstances under which advocacy is mandated,
- how to properly document the advocacy efforts including that permission is obtained from the individual (see Standard 2.2)
- conditions in which supervisory staff become involved
- guidance for handling situations when the level of advocacy required exceeds the limits of your program (i.e. referral to appropriate advocacy organizations) (see Standard 2.5)
- process for initiating a warm transfer (i.e. using 3-way calling to contact an agency and introduce the inquirer and their situation before ending their participation in the call)
- how staff are to represent the contact with a service provided

Standard 3: Crisis Intervention

What role does crisis intervention play in your organization (see Standard 3.1)?

Please identify your crisis service provision, and respond to the required items underneath:

We, 211 Concho Valley, do not provide formal crisis intervention services but have a prearranged agreement with a formal crisis center that does (**Note - this may be a separate program within your organization*).

- #1 (S3) - Document SD009 - Upload your Crisis Intervention policy and/or procedures (see Standard 3.2)

Minimum expectation: The policy and/or procedures must include:

- Staff training on how a 'normal' call can escalate into a crisis call
- Staff training on crisis calls coming through various communication channels
- Risk Assessment form (aka Lethality Assessment)
- Call handling procedures for specific types of emergencies
- Accessing 911 or other rescue services (e.g., Caller ID, call tracing requirements) and protocol for connecting inquirers in crisis with ongoing assistance following stabilization
- Responding to individuals who wish to remain anonymous yet require direct intervention
- Mandatory reporting requirements for endangerment situations (child abuse and elder/dependent adult abuse)

- Annual crisis intervention training for staff (see Standard 3.6)
 - Staff having access to debriefing support when needed
- #2 (S3) - Document SD010 - Upload your Risk Assessment form (aka Lethality Assessment). If your lethality assessments are in electronic format, submit a screenshot.
- #3 (S3) - Document SD011 - Upload the protocols your I&R program has with the crisis intervention center. (*Note - if the formal crisis intervention services are provided by another organization(s), please also provide the signed, written agreement).

We are a formal crisis intervention service but are not accredited by AAS or ICH.

- #1 (S3) - Document SD009 - Upload your crisis intervention policy and/or procedures (see Standard 3.2) *see above
- #2 (S3) - Document SD010 - Upload your Risk Assessment form (aka Lethality Assessment). If your lethality assessments are in electronic format, submit a screenshot. *see above

We are an accredited crisis intervention service (e.g., American Association of Suicidology (AAS) certified and/or International Council for Helplines (ICH))

- #1 (S3) - Document SD012 - Upload proof of your AAS or ICH accreditation. **No need to upload documents 009, 010, or 011

Standard 4: Follow-Up

#1 (S4) - Document SD013 - Upload your follow-up policy and/or procedures (see Standard 4.1).

Minimum expectation: The document includes guidance on:

- obtaining permission to conduct follow-up is required
- describing situations (including at-risk and/or vulnerable contacts) and timelines in which follow-up is required
- describing situations under which follow-up is not allowed or must be conducted under special circumstances for safety reasons (e.g., domestic violence situations) are described and are reasonable
- the time frame of the follow-up call (# of days before the return call) based on the original need of the individual
- how many attempts shall be made to reach the individual before the attempts end
- follow-up will be attempted using the contact method preferred by the individual (e.g. call, text)
- engaging in problem-solving and provision of new/additional referrals when appropriate

#2 (S4) - Document SD014 - Upload a follow-up results report, and/or a link to a real-time dashboard (see Standard 4.4). I&R program must be able to produce a follow up report from all channels/methods of access that helps identify service gaps in the community which includes the following (please ensure that this is a formatted report and not just an export of data from your software):

- the total number of follow ups
- the total or % of needs met/unmet and
- the reasons the needs were not met

Standard 5: Independent Service Delivery Methods:

#1 (S5) – How is information about how to connect with a Community Resource Specialist provided along with independent service delivery methods (e.g., IVR, online database, social media, etc) (see Standard 5.1)?

Minimum expectation: When providing independent access, the public must be given information about how to contact a Community Resource Specialist for assistance.

Description: Information is provided on the state and local websites.

www.211texas.org and www.cvcog.org.

#2 (S5) – Does your organization make supplemental information available on its website for special populations or topics (see Standard 5.7)?

Minimum expectation: The service makes available information for special populations or topics, as appropriate.

Description: Since 211 Texas staff are co-located with the AAA and ADRC, we collectively work on a supplemental document titled the annual Senior Sourcebook. Other supplemental documents such as Housing Inventories, Food Pantries or emergency/disaster documents are completed as necessary and are typically in an Excel or Word doc.

#3 (S5) – Describe your quality assurance process to ensure that information is given via alternate methods, that it is accurate (see Standard 5.9)?

Description: 211 Concho Valley completes test calls, takes feedback from co-located partners, AAA and ADRC, as well as word of mouth from callers and community partners. We will complete follow up with any agencies that we hear are not responding to calls or there appears to be inactivity.

Standard 6: Service Delivery Data Collection, Analysis, and Reporting:

#1 (S6) – How are your organization’s reports used in the community? Reports can be used to support activities such as outreach to diverse communities, community needs assessment, community planning, allocation of funding, system advocacy (see Standard 6.1).

Description: 211 Concho Valley reports produced for our region detail information about the top met and unmet needs, count of calls, and call demographics. We are required to provide quarterly reports to the state agency, TX HHS TIRN program, providing an overview of calls handled and other required specifics. Locally, reports can be used to help address unmet needs, gaps in services and identify opportunity to create new services/programs to address outstanding issues.

#2 (S6) – With whom do you share reports? Please list the reports distributed (internal or external) over the last 12 months (see Standard 6.1).

Description: Reports are shared primarily with TIRN and with the local Advisory and Executive Committee. In the past 12 months, we have provided reports to United Way of the Concho Valley/COAD, as it related to the July flooding event; we have provided reports for the Public Housing entity and Homeless Coalition, as well as, to Concho Valley Community Action Agency for their needs assessment planning. The AaA Director also utilizes 211 reports for Area Agency on Aging and ADRC needs assessment planning.

#3 (S6) – *Document SD015 – Upload a user guide (with definitions/explanations) for the reports you provide for those on your distribution list. When necessary, to assist in the readability of reports (e.g., if containing many abbreviations), reports shall include instructions regarding how to interpret them (aka user guide/definitions) (see Standard 6.1).*

#4 (S6) – Document SD016 – Upload your procedures regarding data collection and analysis that describes how the information is collected and used (see Standard 6.2). It shall include the following:

- individuals having the right to withhold information.
- data-sharing guidelines that protect both confidentiality and PII.
- how a statistically significant sample size is determined to ensure that it is representative of the community

#5 (S6) – Document SD017 – Upload a recent Service Delivery Activity Report (see Standard 6.3). The report should be formatted rather than raw data.

Minimum Expectation: the report should include the following:

- Total number of contacts (e.g., calls, texts, chats, emails, video relay, voicemail, face-to-face, physical mail)
- Total number of contacts by geography (zip code, county, state/province) and by demographics (age, gender, race, etc.)
- The number and percentage of inquiries by contact type including:
 - Information
 - Referral
 - Advocacy
 - Crisis
- Total number and type of problem/needs presented by individuals including both met and unmet needs.
- Trends in community service provision and/or gaps in service

#6 (S6) – Document SD018 – Upload screenshots of your data collection form (aka your contact record) (see Standard 6.3).

Minimum expectation: The data collection form must allow the organization to record and distinguish the following types of required activities:

- Information

- Referral
- Advocacy
- Crisis

*NOTE: If your data collection terminology is different than above, **define and describe:***

#7 (S6) – Do you collect data from independent service delivery methods (e.g., from walk-ins, voicemail, or email contacts, website activity, staff presentations or distribution of publications, social media) (see Standard 6.5)?

Description: Information is collected from anyone who walks into the building (walk-in), email, voicemail, or social media inquiry. 211 Concho Valley also collects information from outreach events, community partners, staff training and any other public forum.

+ New

- Home
- My Drive
- Computers
- Shared with me
- Recent
- Starred
- Spam
- Trash
- Storage

38.8 MB of 15 GB used

[Get more storage](#)

S... > Cons... > 1. ... > Service Del... ▾

✓ ☰ ⓘ

Type ▾ People ▾ Modified ▾ Source ▾

Name ↑	Date modified	
SD001 - United Way of Greater Houston Contract Including ...	Feb 23	⋮
SD002 - TIRN Web-based Chat Guide.pdf	Feb 11	⋮
SD002a - Chat PnP form.doc	Feb 24	⋮
SD003 - Chat PnP form - no multiple transactions.doc	Feb 24	⋮
SD004 - Confidentiality policy AaA 2025.doc	Feb 24	⋮
SD005 - 211 CV PII PnP.docx	Feb 24	⋮
SD005 - Personal Identifiable Information PnP.doc	Feb 24	⋮
SD006 - Confidentiality policy AaA 2025.doc	Feb 24	⋮
SD007 - Nondisclosure for Visitor - Confidentiality policy Aa...	Feb 24	⋮
SD008 - Advocacy PnP.doc	Feb 24	⋮
SD009 - Crisis Intervention PnP.doc	Feb 24	⋮
SD010 - Lethality Assessment - Crisis Intervention PnP.doc	Feb 24	⋮
SD011 - Crisis Intervention Contacts - Crisis Intervention PnP...	Feb 24	⋮
SD013 - Follow Up PnP.doc	Feb 24	⋮
SD014 - Follow Up results.xlsx	Feb 24	⋮
SD015 - Tom Green - Nov 2025 - Example Report.pdf	Feb 3	⋮
SD017 - Service Delivery Activity Report.xlsx	Feb 24	⋮
SD018 - Data Collection screenshot.pdf	Feb 13	⋮

Inform USA Cooperative Relationship Accreditation Requirements

211 Concho Valley responses are in bold throughout the document.

Standard 12: Cooperative Relationships within the I&R System

#1 (S12) – As a way of overviewing the I&R system in your area, please identify the I&R programs in communities you serve:

- Aging and Disability Resource Center (ADRC) – **The Concho Valley Council of Governments facilitates the regional ADRC program. The Access and Assistance Director, Toni Roberts, oversees the regional ADRC, 211 and Area Agency on Aging, which all have IR&A components.**
- Aging I&R/A – **The Concho Valley Council of Governments facilitates the regional ADRC program. The Access and Assistance Director, Toni Roberts, oversees the regional ADRC, 211 and Area Agency on Aging, which all have IR&A components.**
- Child Care Resource and Referral – **per the Texas Information and Referral Network, regional 211 Texas call centers are responsible for maintaining child care resources in the database; information is also updated daily on the website of the Texas Department of Family and Protective Services.**
- Comprehensive I&R/211 – **211 Texas of the Concho Valley is administered through the Concho Valley Council of Governments and is the only 211/comprehensive I&R program in the region.**
- Comprehensive I&R/Non 211 – **we are not aware of another comprehensive I&R program in our region.**

- Library – **each of the counties throughout the region maintains a local library.**
- Mental Health/Crisis Service – **the primary Mental Health Authority (MHA) for the region is MHMR of the Concho Valley, located in San Angelo; they maintain a 24 hour hotline. Additional crisis resources include: Tom Green County Intervention Unit, Open Arms Advocacy Center, and Family Shelter of San Angelo.**
- Military Family Service/Support Center – **Goodfellow Air Force Base Family Readiness Center**
- N-1-1 services (e.g., 311 Program, 911 Service, etc.) – **911 is the only N-1-1 service provided throughout our region. The 9-1-1 Administrative for technology functions is housed through the Concho Valley Council of Governments. Individual 911 call centers are facilitated by each respective entity in the county specific to the service.**
- Volunteer/Donations Management Center – **United Way of the Concho Valley and Community Organizations Active in Disaster (COAD), which is chaired by staff with the United Way. Additional volunteer management programs include: Retired Senior Volunteer Program (RSVP), Senior Companion and Foster Grandparent. These 3 programs are overseen by the Concho Valley Council of Governments.**
- Other: **Concho Valley Community Action Agency, Esperanza Health and Dental, Legal Aid of Northwest Texas, Texas Silver Haired Legislators, Concho Valley Transit District, are a few examples.**

#2 (S12) – Describe the relationships you have with the I&R services you have checked above. What is the nature of each relationship? What are you doing to create relationships where none currently exist?

Minimum expectation: Comprehensive I&Rs have relationships with specialized I&R's (Aging I&R/A, ADRC, Child Care Referral programs, Military Family Service/Support Center(s), etc) and vice versa.

Description: 2-1-1 Texas Concho Valley has maintained relationships with every agency listed above since the inception of the program, established in 2005. There is not another comprehensive I&R program in the region; however, there are a number of agencies in the region who offer specialized I&R. The CVCOG's Aging and Disability Resource Center, established in 2019, as a program of the Concho Valley Council of Governments does utilize the "No Wrong Door" concept, but the target populations are individuals with disabilities, Older Adults, and caregivers for both populations. The CVCOG Access and Assistance (AaA) program incorporates 211, Area Agency on Aging (AAA) and the Aging and Disability Resource Center (ADRC); these 3 programs utilize the same Advisory Committee which currently completes bi-monthly Advisory meetings. Meeting of this Committee includes: 211, Disability Connections, AAA, MHMR, Transit, Workforce Solutions, Workforce Development Board (child care resources), Goodfellow Air Force Base Family Readiness Center, Legal Aid, Managed Care, Housing Authority, Galilee (housing repairs/low-income builds), West Texas Rehab Commission, Shannon Medical Center Case Management, Texas Department of Emergency Management, Texas Health and Human Services Community Care Services (long-term care), RSVP, Esperanza Clinic, etc. All agencies interact frequently and have an understanding of how each agency can assist each other. All agencies work to minimize duplication of efforts, time, and repetition in client advocacy.

If/when there is staff turnover, or, when we identify a possible new agency/provider, we reach out to that entity to provide an overview of the services we offer. We complete frequent outreach efforts throughout the 13 county region throughout the year as well and are constantly trying to identify new opportunities to partner and/or streamline services.

#3 (S12) – Describe the ways your I&R program coordinates its service delivery with other I&R programs (comprehensive or specialized) in the area to avoid duplication of effort and improve access to services (see Standard 12.1 and Standard 12.2).

Description: Since the CVCOG Access and Assistance Director oversees the 211, AAA and ADRC program for the region, the upmost attention to minimizing duplication of efforts is utilized in day-to-day work. An example is that the majority of AaA staff are cross-trained and are able to be utilized in the various programs. All staff are certified to provide I&R services to truly offer a “No Wrong Door” component. We then take this cross-training model in to the community, so that all staff are cross-trained on the basics of 211, AAA, and ADRC so that clientele, the public or community partners are able to receive a streamline, comprehensive overview of the three programs we facilitate. In utilizing this same model, we work closely with other key partners to identify ways to streamline services. The AaA utilizes an online website, www.conchovalleyadrc.org, which is a web-based referral form. This method was created with the input from other service providers such as: social workers, case managers, home health workers, nursing staff, counselors, social security and VA staff, who suggested a method to submit a referral 24/7 so that 211, ADRC or AAA staff could return a call to a person requesting assistance. This tool has allowed “calls” to come in 24/7 and those referring understand that a referral will be contacted within 48 hours. On most days, we return the call within hours of the referral being received. There are often times that we have been able to help out community partners who have deficiencies, such as: a small food pantry who can not handle high call volume for inquiries. By obtaining more data in working with that food pantry, we are able to create a highly comprehensive database update that addresses common questions that callers may be trying to ask. This has proven effective for most similar scenarios.

#4 (S12) - Document CR019 - Upload a copy of an agreement (MOU) with an I&R program or Community Information Exchange Agreement in your community (see Standards 12.2 and 12.3). The document should include the effective date.

#5 (S12) - Document CR020 - Upload a copy of an agreement (MOU) with another (different) I&R program or Community Information Exchange Agreement in your community (see Standards 12.2 and 12.3). The document should include the effective date.

#6 (S12) - Describe any data sharing arrangements (inquirer or resource) you have within your service area.

Minimum expectations: If applicable, describe how you have put safeguards in place (see Standard 12.6 and 12.7).

Description: The resources are made available to the public via the 211texas.org website. If/when requested for printed resources from an inquirer or a service provider, we are able to provide this as well. Most recently, the Texas I&R Network has approved use of the statewide resources to be utilized by other Texas Health and Human Service Commission (TX HHSC) programs, such as Area Agencies on Aging and ADRC's throughout the State. The 211 Texas database will be incorporated in to a new statewide client database system that a number of TX HHSC programs will start utilizing in 2026.

Standard 13: Cooperative Relationships with Service Providers

#1 (S13) - Describe the community partnerships and/or projects that the agency is involved in as well as any networks, coalitions, task forces, boards, or other similar entities of which your I&R service is a member (see Standard 13.1).

Minimum expectation: The I&R service has demonstrated involvement (e.g., membership or attendance) within the service provider community.

Description: 211 of the Concho Valley participates in monthly Homeless Coalition meetings held by the Concho Valley Community Action Agency. We also participate in monthly informational meetings called the Health and Social Resource Coalition that is facilitated by the local IDD. The Area Agency on Aging and ADRC also host a variety of meetings/trainings for their target populations and/or service providers, and 211 Texas staff participate regularly in these events throughout the year. Annually, 211 participates in the Veterans Stand Down event (a resource fair for Veterans held in November). The regional Center for Independent Living (CIL) also hosts an annual event in July to acknowledge Americans with Disabilities Act. Staff also serve on the Adult Protective Services Advisory Committee, the Concho Valley Transit Regional Services Committee, the Concho Valley Community Organizations Active in Disaster (COAD), and the Local Emergency Planning Committee (LEPC).

#2 (S13) - In what community issues are you actively engaged (e.g., housing, transportation, employment, health care)? What has been accomplished? Have you used any data sharing to enhance awareness (see Standard 13.2 and 13.3)?

Minimum expectation: The I&R service contributes to addressing community issues.

Description: As mentioned above, 211 staff are actively engaged in the homeless coalition meetings, veterans awareness events, transportation, aging and disability issues. Most recently our staff participated in an Employer Customer Connection event facilitated by community partners: Texas Workforce Commission – Vocational Rehab – and MHMR Services of the Concho Valley; the event was geared towards engaging individuals with disabilities to connect with employment opportunities that had environments that were conducive for individuals with disabilities. This was also a forum to allow for additional input from individuals with disabilities on what accommodations may be needed from future employers.

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Inform USA Disaster Preparedness Accreditation Requirements

211 Concho Valley responses are in bold throughout the document.

#1 - Overview: Describe the role, both formal and informal, of your I&R service in your community during times of disaster. If applicable, provide examples of disasters/emergencies involving your organization over the past 5 years.

Description: 211 Texas serves as a key player in the Texas Homeland Security Strategic Plan 2021 – 2026 which lays out Texas’ long-term vision to prevent and respond to attacks and disasters. The 2-1-1 Texas Information and Referral Network (2-1-1 TIRN) has a key role in connecting Texans to services in times of terrorist and criminal attacks, natural and manmade disasters, and other emergencies. As a representative to the State Operation Center, 2-1-1 TIRN provides comprehensive and accurate resource information to the public. This resource information is added to the call specialists’ database and website, 211texas.org, for all Texans to access. 2-1-1 TIRN also captures real-time data from the public about their needs (e.g., food, shelter, or points of distribution) during disasters and passes this information to relevant state agencies.

Aside from receiving guidance from TIRN and INFORM USA, 2-1-1 Concho Valley works closely with local and regional partners to coordinate monthly meetings for the planning, training, and preparing phases of emergency/disaster elements.

The most recent local emergency/disaster response was in July 2025 for the catastrophic flooding event that affected 6 of the counties in the Concho Valley region. Within 2 hours of the flooding event to be identified as a disaster, the 211 Director was provided resource information from designated key points of contact from local emergency management officials, to provide updates to the database, so that 2-1-1 Greater Houston Information Specialists would be able to provide callers. The Resource Manager worked through the holiday weekend and over the next 3 weeks on maintaining up-to-date resource information for those affected. The Director worked closely with the CVCOG Administrative staff and completing supplemental electronic resource guides for our rural counties, at the request of our county judges, who were most inundated with calls from their constituents.

Since San Angelo and the Concho Valley region are very rural, a smaller town feel, word of mouth is the quickest way that information is distributed. Our City of San Angelo Public Information Office, Police Department and local media do a very good job in making resource information a priority amongst various media outlets. The 2-1-1 line, for local emergency responses does not usually see a significant increase in calls, however, our staff is usually on-site and/or in coordination with local emergency management officials serving as liaisons of verifying resource information so that it can be made public. For this specific event, it was a longer-term response due to the damage and individuals who were displaced; there were public meetings held to ensure those affected were aware of resources and agencies had the opportunity to assist on site, at the local Bradford Elementary cafeteria. 2-1-1 Concho Valley did coordinate with the regional American Red Cross, regional Texas Department of Emergency Management (TDEM), COAD, and FEMA to provide local resource information and connect people with services.

Standard 14: Disaster Planning

#1 (S14) - Document DP021 - Upload your Emergency Operations Plan (see Standard 14.1).

Minimum expectation: The plan should include:

- procedures for specific types of local and community-wide emergencies that could occur in your community
- procedures for maintaining service delivery during and after an incident.
- building evacuation plan
- staff training and preparation
- designated leadership description that outlines roles and responsibilities of managers and staff before, during and after an incident
- post-emergency activities including procedures for providing critical incident stress debriefing for staff and after-action reporting

#2 (S14) - Document DP022 - Upload your Business Continuity Plan (see Standard 14.2).

Minimum expectation: The plan may include redirection of calls, remote work, continuing to update community resources, training and onboarding temporary staff, etc.

*#3 (S14) - Document DP023 - Upload your Mutual Assistance Agreement with at least one I&R program outside of the service area for the purpose of maintaining service delivery before, during, and after an emergency. The agreement and protocols are updated annually and aligned with the I&R service's continuity of operations plan and emergency operations plan (see Standard 14.3). *Having remote staff does not meet this requirement.*

Minimum expectation: The agreement should include:

- protocols for activation
- cooperative procedures for maintaining service delivery
- training exercises

Standard 15: Relationships with Emergency and Relief Organizations

#1 (S15) - Describe the efforts you have made to develop relationships with emergency management personnel at city, county and state/provincial levels and private sector organizations with a role in the disaster relief and recovery efforts in your community. Include information about the barriers you have encountered, areas where you have been successful, and your next steps (see Standard 15.1 and 15.3).

Minimum expectation: The I&R service has taken steps to develop necessary relationships.

Description: 211 Concho Valley had been in communications with various community partners in the Spring of 2025, in an effort to ensure that we were in contact with all key agencies and personnel, in preparation for an emergency or disaster response. While we had worked closely with all key partners in recent years during the COVID pandemic response, Winter Storm Uri, we had noticed a large amount of turnover in 2025 for those key roles. We felt well prepared when the catastrophic flooding occurred in July 2025. Key partners to the response include: local and state emergency management officials, Texas Department of Emergency Management Division, CV Community Action Agency, United Way of the Concho Valley, and FEMA, are a few examples. Barriers encountered, as with any disaster, is that the information would change frequently due to demands or needs on available resources. While the 211 help line was available to all Texans, we quickly identified that our community would rather have a more “in person/local touch” experience, so we did see an increase to our local Administrative lines through the Concho Valley Council of Governments, rather than a huge influx of calls going to the 211 line. It was thoroughly communicated to all levels of the efforts being conducted by our 211 staff and one of the highlights of those efforts, that we received feedback on, was the quality of the resource management component. Following the inclusion criteria of the 211 database, we created supplemental resources guides for the rural counties, which were updated as needed. These were used by first responders, county judges, and other community providers worked closely with those who had been affected by the flooding event. There was a short and long-term response that was needed and our Resource Manager was able to ensure that records were updated along each phase of the disaster. Seven months post disaster we still have a few database records related to the flooding event of agencies who are still able to assist

those who were affected and have not fully recovered from the event. 211 Texas participates in bi-weekly meetings of the Concho Valley Community Organizations Active in Disaster (COAD) Long-term Recovery Team.

#2 (S15) - Describe your participation and role in local, statewide / province-wide, multi-state / multi- province and/or national disaster exercises (see Standard 15.2).

Minimum expectation: The I&R service participates in community exercises.

Description: 211 of the Concho Valley works closely with the membership of the local COAD and the LEPC to prepare, plan and train for the next emergency or disaster. Meetings are held monthly and quarterly, respectively. On the Texas I&R Network side, we are provided with annual emergency management training opportunities, one in particular related to weather events and hurricane season.

Standard 16: Disaster-Related I&R Service Delivery

#1 (S16) - Describe the steps you have taken to ensure that your Center is capable of handling and/or adapting to an increased level of contacts and needs through a disaster. Include information about the plans you have in place for staffing for service delivery and database management; plan for disseminating information via alternative service delivery methods; internal communication plan; facility Issues (see Standard 16.1).

Description: The cross-training model we have adopted over the past 7 years has proven to be beneficial during times of emergency or disaster. During normal operations, we have up to 5 staff who are cross-trained in 211 matters, however, we have an additional 4 staff who are knowledgeable enough to step in and assist with call handling, resource management, outreach and awareness activities, if/when needed. As mentioned above, aside from providing resource information via the 211 telephony platform, we were able to provide 211 resource information via the CVCOG main line inquiries and created supplemental electronic inquiries via Word/PDF to provide alternative means to receive the information. Also due to the statewide routing that the Texas I&R Network has imposed for the past several years, we are able to rely on a statewide agency capacity to assist with the immediate surge in calls, if that ever occurred for our region. Most times, Concho Valley 211 is assisting with call handling for other regions when they have an increase in call volume.

#2 (S16) - Describe the drills your organization arranges for staff to practice the emergency procedures as outlined in the plans, including the activation of your mutual assistance agreement. Include information about how often the drills occur, what you have learned, what changes you have made in the plans as a result, and the date of your last drill (see Standard 16.2-16.5).

Minimum expectation: The drills occur at least annually.

Description: The last drill occurred in May 2025, and consequently the real-life drill in July 2025 with the flooding event. Various staff were affected, in their personal lives, due to the event, and we had shift job duties to ensure adequate coverage for 211. We also deployed our staff to work over weekends and longer days for the initial days after the event; however, a long-term action plan in this manner was not needed. Typically, we work in conjunction with our LEPC which coordinates with local officials to complete a community-wide emergency drill. Goodfellow Air Force Base has taken the lead on this drill for the past 2 years. 211 Concho Valley is provided with the information of the drill and is able to alert the 211 Texas Network. We also notify our after hours subcontractor, United Way of Greater Houston, once we are in the drill to notify if staff must be off the phones and to alert as to what assistance may be needed. UW Greater Houston is able to easily reskill their staff to handle calls from Concho Valley; however, if this step were not to occur for some reason, all Concho Valley calls would still re-route statewide.

Standard 17: Disaster-Related Resources

The Disaster-Related Resource requirements for the Resource Database are addressed in the Database Review phase of the accreditation process.

Standard 18: Disaster-Related Data Collection/Reports

#1 (S18) - Describe how you document contacts/inquiries during a disaster.

Minimum expectation: Must have the capacity to collect appropriate contact and referral information for disaster related contacts (see Standard 18.1).

Description: Data is captured via CommunityOS and documented accordingly in the system. If we are not able to connect to CommunityOS for any reason, data is captured on a spreadsheet, documenting date of interaction, AIC responsible for taking the inquiry, interaction method (via phone or chat) and a detailed narrative.

#2 (S18) - Describe how you distribute disaster-related information for the community and stakeholders. Include information about the following: volume of disaster inquiries; demographic data; total volume of referrals to specific programs/agencies; met and unmet needs; trends in service provision. Include a distribution plan (see Standard 18.2).

Minimum expectation: Must have the capacity to share disaster data reports to the community and stakeholders.

Description: Information that is captured during a disaster is compiled in to a report that records call volume, top 10 needs, top 10 unmet needs, top 10 agencies. This report is made available to community partners, the public, Advisory and Executive Committee and reported formally to the Texas I&R Network.

#3 (S18) - When was the most recent disaster that your organization responded to?

Description: July 2025, Catastrophic Flooding event.

#4 (S18) - *Document DP024 - Upload the report from the most recent disaster in your area showing the volume of requests, met and unmet needs, etc (see Standard 18.2).*

#5 (S18) - Document DP025 - Upload the After-Action Report describing observations and/or lessons learned from the most recent disaster (see Standard 18.3).

Standard 19: Disaster-Related Technology Requirements

#1 (S19) - Describe the work you have done to ensure technology is in place that will allow you to maintain service delivery and resource information during times of disaster or a localized emergency (see Standards 19.1 - 19.2).

Description: During the COVID pandemic, our agency was able to transition to the possibility of remote work. CVCOG does maintain an IT department that is available after hours, which can help troubleshoot any connectivity issues at any time of day. TIRN has also made changes with minimizing barriers for connecting which includes the software being cloud-based. We utilize yubikeys which serve as multi-factor authenticator (MFA) tools for staff to maintain an extra level of security when logging in. While our staff primarily work from the office throughout the year, we do complete some drills at least twice a year, typically during bad weather months, that days prior to anticipated bad weather, we allow staff to work from home to ensure that all systems are functioning; this has proven to be effective and allowed us to be well prepared for times of actual activation of work from home. Staff have also expressed appreciation for these drills, in that they feel CVCOG cares about their well-being and safety and we are being proactive for possible events. During times of anticipated freezing weather or weather delays, we have activated staff to work from home despite what the actual weather ends up being.

Most recently in January 2026, we did have a winter storm event, that primarily hit over the weekend, but we allowed staff to work from home in the days before and after the event. None of the staff lost the capability to work from home. If/when we do encounter a power outage or other issues that may affect staff working from home, we will work one-on-one with that individual.

**Disaster Recovery and Business Continuity Plan – IT Specific
In the Event of a Disaster:**

The Executive Committee or Executive Director are the sole authority for declaring a disaster for the Data Center and all related IT services, based on the findings of an initial assessment from the IT Department.

The IT Department is responsible for the timely identification and determination of the disaster, as well as for estimating anticipated duration of service outage.

Upon Declaration of a Disaster:

- The IT Department will invoke and comply with procedures outlined in the Disaster Recovery Plan.**
- Priorities of the recovery will be based on the critical nature of the service or application experiencing the outage.**
- All efforts will be made to accommodate user needs while recovery is being implemented**
- The Executive Committee or Executive Director is the only authority for communication to employees regarding the disaster, based on information from the IT Department.**

- **The IT Department is responsible for conveying all information to the Executive Committee or Executive Director for dissemination of status updates and announcements to employees.**

CVCOG SYSTEM SECURITY AND DISASTER RECOVERY

IT Resource Management and Responsibilities

The IT Department reviews ownership of information resources, and works with owners of information resources to develop strategies to meet their required responsibilities and ensure compliance with associated responsibilities. These responsibilities are defined, documented and provided by the IT Department.

Information Resource Owner Responsibilities:

- **The Information Resource Owner is responsible for and authorized to classify business functional information into the following categories:**
 - o **Confidential Information – includes including Social Security numbers, other personal information, employment records, payroll records, and financial records;**
 - o **Restricted Personal Information – includes information protected under state or federal law, such as financial or medical information;**
 - o **Mission Critical Information – includes information that is essential to CVCOG operations**
 - o **Non-Critical Information – includes information that is generally available to the public, or has a minimum impact on CVCOG clientele.**

- **Information Resource Owners shall assess a risk level based on inherent risk, with a ranking of High, Medium or Low. Criteria for each of the three levels are:**
 - o **High Risk – involves high dollar amounts, or significantly important information that would impact the operations of the CVCOG, or contains confidential or sensitive data, or impacts a large number of people or the CVCOG network;**
 - o **Medium Risk – involves moderate or low dollar amounts, or information that could potentially create problems for the parties involved, or impacts a moderate portion of the CVCOG’s clientele;**
 - o **Low Risk – generally available public information, or results in a relatively small impact for the CVCOG.**
- **Approve access and formally assign custody of an information resource asset;**
- **Specify data control requirements, based on risk assessment, to the Information Resource Custodian and User;**
- **Verify that controls are in place and compliance is met; and**
- **Review access permissions based on security risk assessment.**

Information Resource Custodian Responsibilities:

- **Implementing controls specified by Information Resource Owners;**
- **Providing physical and procedural safeguards for resources;**
- **Assisting Information Resource Owners in evaluation of cost-effectiveness of controls and monitoring; and**
- **Implementing monitoring techniques and procedures for detecting, reporting, and investigating incidents.**

Information Resource User Responsibilities:

- **Ensuring that resources are used only for their designated purpose; and**
- **Complying with controls specified by Information Resource Owners.**

Managing Physical Security

Access to the IT Data Center (or server room) is rigorously controlled. Only authorized CVCOG personnel are permitted access to the IT Data Center. An annual review of the physical security measures of the Data Center is conducted and documented. IT personnel are trained in monitoring environmental controls, as well as in appropriate responses to equipment problems and emergencies. Appropriate safety procedures are followed and annual testing is conducted.

Vendor / Other Access

Vendors' or others' physical access to the IT Data Center requires approval and authorization by the Executive Director or IT Department. Vendor or other non-employee access is for a limited time only. A log is maintained of all non-employee access to the IT Data Center.

Managing Security Risks

A security risk analysis of information resources shall be performed and documented: Annual risk assessments will be conducted on information resources classified as high risk; biennial risk assessments will be conducted on information resources classified as medium or low risk.

Security risk results, vulnerability reports and other security analysis information shall be presented to the Executive Committee or Executive Director. The Executive Committee or Executive Director shall make the final security risk management decision, either to accept the risks or to modify security and controls for information resources based on their value and sensitivity. The Executive Committee or Executive Director must approve the final security risk management plan.

Protection of IT Equipment:

All authorized users share in the responsibility to protect CVCOG desktop computers, terminals, telephones and other IT systems and tools from physical and environmental damage or loss. IT users are responsible for the correct operation and physical security of CVCOG desktop computers, terminals, telephones and other IT tools. Destruction, theft, alteration, or any other form of sabotage of CVCOG information technology resources is prohibited and will be investigated and prosecuted to the fullest extent of the law.

IT Protection While Logged On:

Desktop computers and terminals in accessible locations should not be left unattended, to prevent inappropriate access to CVCOG information by unauthorized persons. Employees in such locations should lock their workstation or log off when leaving their work-area for an extended period of time. Password-protected screen savers should be enabled on all workstations with no less than a 10-minute inactivity threshold.

Security Monitoring

All CVCOG computers and network activity are subject to ongoing and unannounced security audits. Inappropriate use of the systems and/or networks which are in violation of CVCOG policies or local, state or federal law will be investigated (e.g., copyright violations, inappropriate, threatening, or potentially harmful content). The IT Department will authorize these investigations and appropriate authorities will be notified. The CVCOG has the right to disclose the contents of electronic files if/as required for legal purposes; audit purposes; and local, state, and/or federal statutory purposes.

Monitoring Usage:

All department heads within the CVCOG are responsible for ensuring that their employees are aware of these policies and procedures and adhere to them. Department heads suspecting inappropriate usage should contact the IT Department for possible security audit. Program Directors must countersign a completed Information Technology Use and Access Release form for each authorized user, and then forward the form to the CVCOG IT Department prior to activating user access to CVCOG information technology. Signed and countersigned Information Technology Use and Access Release forms are kept on permanent file in the Human Resources Department.

Viruses and Other Malicious Code

Purpose of This Policy:

- To establish procedures that define the responsibilities for reducing the threat of computer viruses to CVCOG computers and network;
- To establish responsibility for oversight of computer virus protection activities within the CVCOG;
- To establish a reporting mechanism to ensure that all appropriate personnel are contacted in case of a computer virus incident;
- To promote awareness of the threat posed by computer viruses to CVCOG IT users; and
- To ensure that virus protection software and procedures are properly implemented, and utilized on a regular basis.

Due to the collaborative nature and sensitivity of the work performed by the CVCOG, all CVCOG computers must have an approved anti-virus program installed. Users' continued access to the CVCOG network is contingent upon the installation of an approved antivirus on all CVCOG-owned computers, to eliminate any possibility of a network-wide virus infection and the resultant disruption of productivity. This virus protection software must not be disabled, bypassed, or modified in any way.

Specific Restrictions:

The CVCOG expressly and specifically prohibits the following:

- The development of any form of computer virus with the intent to distribute throughout the CVCOG network or beyond;
- The intentional distribution of a virus, regardless whether nuisance or destructive; and
- The intentional creation of a false alarm by use of a hoax virus message.

Specific Responsibilities and Guidelines for Virus Prevention:

The end user is responsible for virus-scanning all files which are downloaded from the internet or introduced to the CVCOG network on portable storage media from external sources. Anti-virus software is provided to end users to perform this task. It is the end user's responsibility to make sure the proper use of the anti-virus scanning software is clearly understood. If anti-virus software is not installed or does not function properly, contact the IT Department immediately.

All CVCOG personnel should:

- **Understand the risks associated with viruses, and the preventive measures that can reasonably be deployed;**
- **Be aware of and follow the procedures outlined in CVCOG IT announcements, which are generated to communicate warnings of computer virus threats;**
- **Treat nuisance viruses with the same urgency as destructive viruses;**
- **Annotate any recent anomalous computer activity, such as unexpected disk access, error messages or screen displays and, if possible, include when the anomaly first occurred;**
- **Annotate the name of the virus, if provided by the virus detection software;**
- **Contact the IT Department for instruction if a computer virus is suspected or detected;**
- **Ensure that files received from external sources are absent viruses prior to use or distribution;**
- **Never introduce or use non-licensed software on any CVCOG computer;**
- **Back up critical data to the server at least once a week.**

Purview of the IT Department:

- **Oversight of computer virus protection within the CVCOG from the date of asset acquisition, to include the server, desktop computers, and internet mail gateways.**
- **Observation of current virus exploits; including evaluation, recommendation and maintenance of virus protection software and tools for use on CVCOG's information technology resources.**
- **Coordination of requisite training for virus control, and monitored assurance of CVCOG-wide compliance with virus protection policies.**
- **Investigation and verification of every report of apparent computer virus infection, and, if necessary, determination of the source of infection.**
- **Annotation of:**
 - o **any recent anomalous computer activity, such as unexpected disk access, error messages or screen displays;**
 - o **if possible, the first instance of the anomaly;**
 - o **the name of the virus, if provided by the virus detection software;**
- **Isolation of infected computer/s from the CVCOG network as soon as possible. Reasonable effort should be made to notify user/s prior to disconnection from the network; although the nature of the virus may preclude such notification.**
- **Identification and isolation of the suspected virus or worm-related file and processes. Do not power off or reboot computers that may be infected, as these actions have the potential to destroy disk data, and/or destroy vital information or evidence.**

- **Sequestration and/or removal of suspicious processes from the computer. In the event of a worm attack, it may be necessary to keep the computer/s isolated from the network until all CVCOG computers have been inoculated and/or other internet sites have been cleaned and inoculated.**
- **Implementation of fixes and/or patches to inoculate computers against further attack.**
- **Notification of all users when computers are returning to fully operational status.**

#2 (S19) - Describe the exercises you have taken to ensure the I&R program has the technical ability to continue services including a plan for disruption in services (see Standards 19.3 - 19.7).

Description: As mentioned above, throughout the year, we allow staff to prepare to work from home to identify any connectivity issues. The most common barriers we encounter are that staff need a password reset. Sometimes staff fail to log in to their CVCOG account with their laptop, while on CVCOG premises, to ensure their current password has synced correctly. During these times, CVCOG IT is able to reset their password remotely. However, we try to minimize these occurrences by training and working with staff to prevent this from happening.

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DP021b - Concho Valley 211 - Program Specific - One Page.d...	Feb 23	⋮
DP021c - Concho Valley 211 -COOP - IT Specific - Reviewed ...	Feb 23	⋮
DP022 - Concho Valley 211 - FY 25 COOP.docx	Feb 23	⋮
DP023 - United Way of Greater Houston Contract Including ...	Feb 23	⋮
DP024 - July Flooding event - Report 1.xlsx	Feb 23	⋮
DP024 - July Flooding event - Report 2.xlsx	Feb 23	⋮
DP025 - After Action Report - July 2025 flooding event.pdf	Feb 10	⋮

Inform USA Organizational Effectiveness Accreditation Requirements

211 Concho Vally responses are all in bold throughout the document.

Standard 20: Governance and Oversight:

#1 (S20) - What is the legal status of your organization and I&R service?

- Private, nonprofit
- **Government – The Concho Valley Council of Governments is a political subsidy of the State of Texas.**
- For-profit

#2 (S20) - Describe the governing body and oversight arrangements for your I&R service that ensures the following:

- diverse interests of the community are represented
- oversight of the implementation of goals and objectives that ensure service quality and program sustainability (see Standard 20.1)

Minimum expectation: There is a governing body that oversees the I&R program (e.g., Board of Directors, Advisory Committee).

Description: 2-1-1 Texas of the Concho Valley is a program of the Concho Valley Council of Governments that is governed by an Executive Committee. The Committee provides general oversight over all CVCOG programs. We also utilize the Advisory Committee for the Area Agency on Aging and Aging and Disability Resource Center to provide updates, seek input, and work to address unmet needs for the region.

#3 (S20) - *Document OE026 - Upload the roster of your governing body (i.e. Board of Directors/Advisory Committee) (see Standard 20.1).*

#4 (S20) – Document OE027 – Upload the organization’s bylaws (see Standard 20.1).

#5 (S20) – Describe the process followed for reviewing and updating program policies and procedures (e.g. when does this occur; who is involved; is there input from I&R staff; how does the I&R staff learn about changes?) (see Standard 20.4).

Description: The Concho Valley Council of Governments maintains an Employee Handbook which is taken before the CVCOG Executive Committee for review and approval of edits. Each time there are significant changes to the Employee Handbook, the CVCOG Human Resources department establishes a subcommittee to review the current Handbook and identify suggestions for edits, implementation, clarity, etc. One representative from each CVCOG department participates in the subcommittee and is able to share viewpoints from their respective programs. The most recent Employee Handbook review included the Access and Assistance Director, Toni Roberts, who oversees the 211 Texas program. She was able to offer insight about requirements and expectations related to all 3 programs she oversees, addressing concerns with client confidentiality, disaster response, client interactions, training requirements, etc. For program specific policies and procedures, this is discussed with other 211 Texas Directors, discussed with our local Access and Assistance staff (including 211), and shared with the CVCOG Executive Director and HR Director for review and feedback. Most formal overhauls/comprehensive updates are completed during times of State (Texas Information and Referral Network – TIRN) monitorings, TIRN Request for Proposal (RFP) and/or during time of Inform USA Accreditation reviews.

#6 (S20) – Document OE028 – Upload the policies and/or procedures pertaining to your governing body (see Standard 20.4 and 20.10). **We are providing the CVCOG Executive Committee by-laws, same document provided for the response to #4, above. This is the only document that the Board utilizes to carry out duties.**

#7 (S20) – Document OE029 – Upload your organization’s Employee policies and/or procedures (sometimes known as an Employee Handbook) (see Standard 20.4 and 22.5).

#8 (S20) – Document OE030 – Upload your Code of Ethics for the I&R program that all staff receive and agree to follow (see Standard 20.7).

#9 (S20) – Document OE031 – Upload your organization’s Fiscal policies and/or procedures (e.g., a document from within your finance department outlining their practices. This is a document followed by your financial team that addresses procedures such as internal control, budgeting and finance, asset management, transparency and accountability (see Standard 20.4 and 20.9).

#10 (S20) – Describe two system advocacy efforts (public policy or educational activities) that you have engaged in during the last 12 months and what they achieved (e.g., letter writing campaigns, visits to political representatives, testimony at public hearings, holding press conferences, writing articles for local newspapers, providing interviews to local media, speaking to groups, working through coalitions, and/or reports in support of public policy goals) (see Standard 20.5). The two examples should include:

- an issue that is important to your community
- an issue that relates to furthering your I&R program and/or the industry as a whole

Description: Example #1: issue important to community – 211 Texas participates in monthly homeless coalition meetings, working in collaboration with other community partners to identify solutions for addressing the housing needs for the region.

Example #2: issue that relates to furthering your I&R program and/or industry as a whole. 211 Texas Concho Valley participated in a monthly I&R coalition call spearheaded by United Ways of Texas. We were able to provide our regional perspective on challenges and share solutions that could be considered for legislative advocacy. Some of the key concerns were the need for additional funding for more call specialists across the 211 Texas network and more statewide collaboration for emergency/disaster response efforts.

#11 (S20) – Describe your process(es) for registering and attempting to resolve complaints from individuals, staff members and the community (see Standard 20.6).

Description: We utilize a grievance procedure for any formal complaints against CVCOG employees, specifically 211 staff. For complaints about regional providers or system concerns, we ask the client for permission to advocate on their behalf to find resolution to the matter. Once verbal permission is granted, staff will work with the agency/program/person to gain better understanding of the situation to see what changes could possibly be made.

#12 (S20) – *Document OE032 – Upload the organization and/or I&R program’s Non-Discrimination policy and/or procedure that prohibits all forms of discrimination (see Standard 20.8).*

#13 (S20) – Document OE033 – Upload your organization’s Data Retention policy and/or procedure (see Standard 20.12)

Standard 21: Technology:

#1 (S21) – Describe your strategy to maintain and advance your IT infrastructure to ensure that services are enhanced, the contact preferences of inquirers are considered, and privacy and confidentiality of individuals are protected (see Standard 21.1, 21.2 and 21.4)?

Minimum expectation: A technology plan is in place and is reviewed annually by your governing body/organizational leadership.

Description: Please see Attachment OE034b, General IT Operational Procedures, and Attachment OE034a, Information Technology Policy and User Guide. This plan is currently under review by the CVCOG IT Manager and the CVCOG Executive Director. They are taking in to consideration a variety of IT related guidance that has been discussed at the State and Federal level over the past year and the goal is to implement the updated process and procedure by 10/1/2026. Similar to the recent CVCOG Employee Handbook, a subcommittee of representatives from each CVCOG program will be established and allowed time to discuss and offer input, allow time to apply some changes to function to test-out any limitations on proposed changes. Once a final draft is completed at the program level, the proposed plan will be taken to the CVCOG Executive Committee for review and approval.

#2 (S21) – Describe your provisions for ensuring a priority response to any breakdowns in key infrastructure (see Standard 21.3).

Description: By contract, 211 Concho Valley is required to notify the Texas Information and Referral Network (TIRN) within 30 minutes, if we experience any system outage that interrupts services due to any cause (e.g., internet failure or power outage) and must provide at least twice daily updates until the identified incident is resolved. Within the first two (2) hours of the outage, 211 Concho Valley must provide the outage report. If system outage last two (2) hours or more, the AIC must submit an incident report within twenty-four (24) hours of when the outage began. HHSC will provide a template to include the following information:

- A. Details of the outage/incident.**
- B. When and how the outage/incident was discovered.**
- C. Impacts to operations, systems, and/or staff.**
- D. Root cause of the outage/incident, including verifying documentation from the provider responsible for the outage.**
- E. Detailed corrective measures taken by the AIC to mitigate the problem and long-term corrective actions to detect and prevent future incidents, including identification of alternative providers of the failed service, if feasible and/or available. HHSC/TIRN will provide a template for the outage and incident report.**

If/when this occurs, 211 Concho Valley will work most closely with the after hours subcontractor to implement immediate phone coverage. If there will be a longer-term outage, 211 Concho Valley will notify the 211 Texas network of the need to route calls statewide and provide explanation and timeline of the incident. Phone coverage is the most immediate need that would involve additional assistance from partners outside of the CVCOG. Other 211 staff may still be able to complete work activities such as database maintenance, outreach and awareness activities, Administrative coordination of services.

#3 (S21) - Document OE034 - Upload a copy of your Technology Redundancy and back-up policy and/or procedure which demonstrate how you safeguard critical data and systems (see Standard 21.3).

Minimum expectation: The document should address/describe:

- how to access backup in emergency situations
- security arrangements for inquirer data and the resource database
- conducting exercises regarding data back-up and system restoration protocols

Standard 22: Personnel Management

#1 (S22) - Document OE035 - Upload a copy of an Org Chart that shows key positions within the agency and includes all positions within the I&R program. The job descriptions requested below should be aligned with this chart (see Standard 22.1).

#2 (S22) - Document OE036 - Upload your Succession Plan; this plan identifies leadership transitions for replacement of key I&R positions (e.g., mapping who will fulfill the roles of program manager/director, database manager, etc) and includes strategies for development of current staff (see Standard 22.2).

#3 (S22) - Document OE037 - Upload written job descriptions for all employees and volunteers of the I&R program. They should outline responsibilities, essential job functions and supervisory relationships (see Standard 22.3).

#4 (S22) - Document OE038 - Upload your Hiring policies and/or procedures. This could include how you will identify, attract and select candidates; background checks, nondiscrimination, workplace diversity, etc (see Standard 22.4).

#5 (S22) - Document OE039 - Upload your employment interview questions for each of the key positions within the I&R program (e.g., community resource specialist, database curator, supervisor, manager) and the rating form used to evaluate responses (see Standard 22.4).

#6 (S22) - Document OE040 - Upload your policies and/or procedures relating to remote I&R work (see Standard 22.6).

Minimum expectation:

- Staff ensure an environment that supports the privacy and confidentiality of information (see Standard 22.15)
- technology capable of making three-way calls and/or facilitating a warm transfer (e.g., crisis centers, language translation, etc.)
- contact emergency services while maintaining a connection with the inquirer
- the ability for supervisors to exercise quality assurance measures
- access supervisory assistance, when required

#7 (S22) - What healthy workplace initiatives has your I&R program recently developed (e.g., stress reduction, strategies for burnout) (see Standard 22.9)?

Description: The CVCOG maintains an Employee Engagement Committee which is geared towards addressing employee morale throughout the year. The Engagement Committee is composed of representatives from each of the core CVCOG programs and works to

complete staff engagement opportunities throughout the year. Examples include: Coffee and Dancing Friday's, Movies and "Brown Bag Lunch", potlucks, food truck days, around the holidays – CVCOG has implemented an annual cornhole tournament that staff look forward to each year around the Thanksgiving holiday. During the Christmas break, it has become traditional to play trivia games during the annual luncheon. There is also an annual Staff Appreciation luncheon that has been hosted at various restaurants in town, which allows staff to be catered to, and they have stated that they have enjoyed this option.

Throughout the year, we discuss topics like stress reduction, strategies for burnout, and the Admin work throughout the year to address individual signs of stress and burnout to work one-on-one with staff to help address work-life balance because sometimes the stressors aren't related to the job duties, but rather the personal stressors related to home life.

CVCOG Wellness Plan option

In accordance with State law, employers are permitted to allow each employee 30 minutes during normal working hours to exercise three times a week. If you would like to participate, please discuss this with your supervisor. Some programs may require you to submit a Wellness Schedule Request Form. Your request to participate must be approved by your supervisor and the Executive Director. The following criteria are to be followed

- You must be in good standing, and not be on probation or suspension**
- This privilege can be revoked at any time**
- Time MUST be broken up into 3 days, and not all 90 minutes can be used at once**
- Participation is dependent upon approval from each Department Director. Due to operational needs, funding requirements, or staff availability some departments may not be able to allow participation**
- Abuse or misuse of this program will be grounds for loss of privilege**

Additional work place initiatives CVCOG has in place, through recent changes to insurance providers includes: Baylor, Scott & White (BSW) Be Well program – this provides Webinar Wednesdays, new topics each

Wednesday to help us live happier and healthier; WebMD: Wellness at Your Side – personalized support to live well through the BSW digital wellness platform, and the Be Well newsletter. BSW also provides ComPsych GuidanceResources program anytime for confidential assistance, which provides support, resources and information for personal and work-life issues. The program is company-sponsored, confidential and provided at no charge.

#8 (S22) – Describe the call management system reports, measures, and other indicators you use to assess individual community resource specialist efficiency and productivity (see Standard 22.10)?

Minimum expectation: Supervisors have access to a system that is in place for determining how well individual community resource specialists are helping the I&R program meet service goals.

Description: On a monthly basis, calls are monitored for Quality Assurance purposes for each Call Specialist. Further, on an annual basis, those monitored calls and results are reported to TIRN on the 1st quarter of each new Fiscal Year. Calls/services are monitored by in-person observation, by “mystery shopper calls”, by reviewing random calls handled by utilizing recordings. We also run monthly reports from CommunityOS that are reported on a quarterly basis to TIRN that assesses estimated number of calls offered, calls handled, abandonment rate, quality assessment, number of follow up calls completed, etc.

#9 (S22) – Describe how you provide ongoing performance feedback for all staff (see Standard 22.11).

Minimum expectation: There is a clear mechanism for providing ongoing supervision using a *standardized observation form(s)*, and measuring employee performance using an *employee performance appraisal form/review* that addresses specific responsibilities and job functions as outlined in the individual’s job description.

Description: Specific to call handling, we utilize the TIRN approved Quality Assurance form and we offer feedback to staff based on these reviews. For CVCOG purposes, we utilize a Performance Review template, completed twice a year; once a year, we review each person's job description to ensure duties continue to align with the job description. We also utilize the CVCOG Core Competencies tool that takes the key core competencies that are listed in each job description to provide a numerical scoring to use as a discussion piece when reviewing scale of execution and expectations.

#10 (S22) - Document OE041 - Upload your Standardized Observation form/rating sheet for call monitoring (for CRS). This form typically includes space for ratings of the call (either alpha or numeric), qualitative findings, and an area for opportunities for improvement (see Standard 22.11).

#11 (S22) - Document OE042 - Upload your standardized observation form/rating sheet for resource database curation (for CRS-DC). This form typically includes space for quantitative rating of the resource, qualitative findings, and an area for opportunities for improvement (see Standard 22.11).

Currently, the primary method we utilize to ensure the Database Manager is meeting deliverables is by quarterly and annual reporting on the TIRN approved template. This reporting tool assesses the number of Annual Formal Reviews conducted, the Annual Resource Record Update Rate, number of resources updated/added, number of resources deactivated. Through this reporting and the document referenced above regarding Core Competencies is how we complete observation and rate for the resource database curator role.

#12 (S22) - Document OE043 - Upload your Employee Performance Appraisal forms/reviews that are used for I&R staff (see Standard 22.11).

#13 (S22) - When performance problems are identified, how are they addressed? Describe what you do (see Standard 22.12).

Minimum expectation: A clear way of dealing with performance problems is in place.

Description: If/when performance problems are observed, we first informally provide coaching and guidance. We will follow up with an email to provide a recap of the issue, what was discussed and set expectations. If the same issue occurs again, we escalate to a Performance Improvement Plan, prior to any official verbal or written warnings. If the same issue persists, then we complete a formal verbal warning which identifies in writing the issues, the timeline for improvement, etc. If the issue persists, it escalates to a formal write up, identifying the issue, expectations and timeline for improvements.

#14 (S22) - Document OE044 - Upload your Individualized Performance Improvement plan for I&R staff (i.e. a templated document used when performance issues have been identified and a plan is needed for improvement) (see Standard 22.12).

Standard 23: Staff Training

#1 (S23) - Is the content of the staff training program consistent with the objectives listed in the Inform USA I&R Training Manual (see Standard 23.1)?

Description: Primary methods of training are utilized from the Inform USA platform. This may be online trainings, virtual and in-person conferences. Additional trainings may come from the State Inform USA association and other partners such as Area Agency on Aging, Aging and Disability Resource Center, local mental health authority and/or center for independent living. Additional examples include: Angelo State University Business Development Center and the local college/university and nursing programs.

#2 (S23) - Are training objectives consistent with the tasks, knowledge and skill requirements of Inform USA certification programs (via the Job Task Analyses) for CRS, CRS-A/D and CRS-DC (see Standard 23.2)?

Description: Yes, all objectives are in line with expectations related to the staff role, job duties and overall program.

#3 (S23) - What training methods do you use (e.g., online courses, lectures, audio/visual materials, reading assignments, oral/written exercises, role plays, modeling by experienced workers, other) (see Standard 23.3)?

Description: Throughout the year, we utilize all available methods for training. The most impactful and flexible is online training. We have team meetings to present immediate training or guidance topics and we provide in-person trainings options at least 1-2 times per year for staff.

#4 (S23) - *Document OE045 - Upload the Table of Contents for your community resource specialist training program (see Standard 23.5).*

211 Concho Valley utilizes the same document for responses to #4 - #7 in this section. However, the document was saved with the corresponding document # as listed.

#5 (S23) - Document OE046 - Upload a detailed, day-by-day training agenda for your community resource specialists that outlines objectives, training methods (how material is presented) and materials, timeframes, outcomes for each section and total hours spent for onboarding (see Standard 23.5).

#6 (S23) - Document OE047 - Upload the Table of Contents for your database curator training program (see Standard 23.5).

#7 (S23) - Document OE048 - Upload a detailed, day-by-day training agenda for your database curators that outlines objectives, training methods (how material is presented) and materials, timeframes, outcomes for each section, and total hours spent for onboarding (see Standard 23.5).

#8 (S23) - What is covered in the new hire orientation for all I&R staff, including community resource specialists, and database curators, managers, administrative staff (see Standards 21.6 and 23.5).

Minimum expectation: The training includes organizational/program mission, structure, range of services provided and the function associated with specific positions, legal requirements that affect service delivery, compliance training required by stakeholders and jurisdictions, and cybersecurity.

Description: All required training and core work competencies are covered in the training; this includes local CVCOG processes, procedures, expectations, as well as, State and Federal requirements. Staff review all current contracts for a better understanding of organizational measures and expectations. Required trainings and forms are completed within the first week, in order of prioritization. Example: review and signing of CVCOG Employee Handbook, IT Usage Agreement, Confidentiality and Conflict of Interest and Emergency Management/Continuity Plan. These must be completed first in order for staff to access relevant tools to complete core training.

#9 (S23) - Describe when and how testing or assessment of stated competencies occurs. Describe your procedures for addressing trainees who do not demonstrate competency at the required level (see Standard 23.6).

Description: New hires work closely with key Administrators who are able to easily identify any budding concerns. Some of the most notable assessments are identified in how well a person can follow basic instructions in completing training, their organization and time management skills. These are all traits that are measurable and help us in determining a person's ability to continue progressing on the training schedule. If/when we identify any deficiencies, we provide coaching and guidance; we follow up with an email to provide documentation on the efforts made and to serve as a resource for the new hire. In the past, these efforts have proven helpful in providing explanation to Human Resources as to why we did not find a new hire suitable to continue past the 90 day Introductory Period. Despite all of our efforts and various adjustments to assist the staff person in learning material, it was evident that this was not going to be a position that this person could be successful in completing long-term.

#10 (S23) - Document OE049 - Upload examples of tools used for measuring an I&R trainee's level of competency. Please include a form for CRS and CRS-DC positions (see Standard 23.6).

We utilize the same tool as mentioned above in previous responses.

#11 (S23) - Describe the ongoing training and professional development provided for I&R staff. Activities may include in-house training or external training such as continuing education classes, webinars or workshops offered at an I&R conference, or other professional gatherings.

Minimum expectation: There is a plan to provide ongoing training and professional development for I&R staff.

Description: We maintain a spreadsheet, on an annual basis, that captures the following data:

Staff Name, Hire Date, Required New Hire Training, Ongoing/Annual Training, Options for Inform USA Re-certification training. We maintain individual staff tabs for recognition of the name of the training, date that the training was completed. Within this same spreadsheet, we also maintain a list of all staff who hold Inform USA certifications, which certs, issue date and date to re-certify.

#12 (S23) - Document OE050 - Upload your I&R Training Evaluation form (see Standard 23.8).

#13 (S23) - Document OE051 - Upload your I&R trainer evaluation form (see Standard 23.8).

#14 (S23) - What percentage of community resource specialists and database curators hold professional I&R certification (see Standard 23.9)? Fill out the chart below. **Note - you do not have to send us the actual Certificates. This can be a certification other than Inform USA. If so, it must involve a professional certification that relates to the field & practice of Information & Referral, that is acquired through an examination process, and is maintained through ongoing professional development. This is not the same as a curriculum-based 'certificate', obtained following the completion of a training course (if unsure, please contact the Inform USA accreditation director). If Certifications are not through Inform USA, please indicate the name of the certifying organization and name of credential(s) awarded.*

Minimum expectation:

- 51% of eligible community resource specialists and 51% of database curators have professional certification
- or are scheduled to take the certification exam.

Each category includes related managers that provide direct services to the public.

Service Delivery Staffing & Certifications	a) Total staff	b) Staff not yet eligible for certification	c) Staff eligible: <i>Column A - Column B</i>	d) Staff certified (include names)	e) Staff scheduled to be tested (include names and dates):	f) Percent of staff Certified and scheduled to be tested: <i>Column D + E / Column C</i>
<i>CRS Example</i>	20	2	18	10	2	$10+2/18 = 67\%$
Community Resource Specialists	5	0	5	5 Toni Roberts, Sandra Villanueva, Victoria Ybarra, Nicole Rodriguez, Erin Hernandez	0	100% of staff are certified

Community Resource Database Curators	4	0	4	3 Toni Roberts, Erin Hernandez, Victoria Ybarra	1 Sandra Villanueva	We have 3 staff certified as database curators, out of 4 staff who can work on the database.
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Sorry I found this table difficult to complete percentages.

Standard 24: Promotion and Outreach

#1 (S24) - Document OE052 - Upload your Outreach plan for promoting your service (including objectives, activities, methods and strategies) (see Standards 24.1, 24.4 and 24.5).

#2 (S24) - Document OE053 - Upload your Outreach report for the I&R program describing the plan, the outputs, and outcomes (what was accomplished) (see Standard 24.2).

#3 (S24) - Describe the steps taken to evaluate the efficiency and effectiveness of your plan. Indicate the sources used in the evaluation process (e.g., demographic data, tabulation of referral source data) (see Standard 24.2).

Minimum expectation: There is a process for evaluating the effectiveness of the plan.

Description: In the past year, we have utilized QR codes to seek feedback regarding our outreach efforts. We also utilize feedback from our Advisory Committee, Executive Committee, staff feedback, community partners and any input received from surveys or word-of-mouth.

Standard 25: Quality Assurance

#1 (S25) - Describe the quality measures and performance metrics used to evaluate the various channels of I&R service delivery (e.g., average speed of answer, abandonment rate) (see Standard 25.2 and 25.11).

Minimum expectation: Metrics are measured and regularly monitored.

Description: Via the TIRN quarterly reporting tool, we pull monthly data on the following components. At minimum, on a monthly basis, we monitor the following components of service delivery:

Estimated Calls Offered, Calls Answered, Local Calls Offered vs Flow-outs, Abandoned Calls, Number of Follow up Calls scheduled v completed.

Based on the metrics above a service level is determined for the percentage of calls answered within 60 seconds. For our call center, the TIRN requirement is that we must have an 80% service level, since our call volume tends to be at 10,000 or less calls handled in a year.

#2 (S25) - *Document OE054 - Upload a Summary report from your call management system/ACD or the annual report you receive from your telecom provider (see Standard 25.2).*

#3 (S25) - What organizational changes have been made based on the analysis of these data reports?

Description: Based on review of this data, throughout the year we may adjust staffing levels as needed.

#4 (S25) – Describe your process of conducting regular customer satisfaction/quality assurance surveys to assess overall service performance and I&R service outcomes? Include information about when and how surveys are conducted, selection criteria for participants, the number and/or percentage targeted per year, the customer satisfaction and service outcome questions asked (see Standard 25.3, 25.8 and 25.9).

Minimum expectation: A structured way of measuring customer satisfaction/quality assurance has been implemented, and feedback from the process has been used to improve service delivery outcomes.

Description: : The call form in CommunityOS database platform has a tab in which a Call Specialist can conduct a survey to a caller. The yes/no questions consist of: Did we provide you with the information you requested? Are you likely to contact the agencies we referred you to? Was the 2-1-1 worker helpful and courteous? Would you call 2-1-1 again? Will you tell a friend about 2-1-1?

The surveys are administered for each caller when a follow up is conducted. According to 2-1-1 Texas Concho Valley policy, follow-up on calls (besides crisis calls) will be done on a quarterly basis. I&R Specialists are required to perform follow-up on 2% of calls by telephone. Call specialists keep track of surveys on spreadsheet.

#5 (S25) – *Document OE055 - Upload your most recent customer satisfaction/quality assurance report results for the I&R program (see Standard 25.3). *Note - This could be done at the same time as follow up calls, but this data is different from follow-up. Please ensure that this is a formatted report and not just an export of data from your software and includes the following:*

- total number of surveys attempted
- % of surveys completed
- results/response to each question

#6 (S25) - Document OE056 - Upload the work plan that includes written goals and objectives from the previous year (see Standard 25.7).

Pages 24 - 26

#7 (S25) - Document OE057 - Upload the corresponding program evaluation report (see Standard 25.7). Please include the following:

- an overview
- description of the service evaluated
- what data sources you used
- methods used and results
- type of reviewer: internal or external
- community involvement

#8 (S25) - Describe the process of obtaining outcome information (i.e. the impact/result of interaction with your I&R program). This could be obtained via direct follow-up with individuals, data partnerships, electronic surveys, case studies and impact stories and other measures (see Standard 25.8). This could include the following:

- met or unmet needs
- improvement/impact rates
- contact narrative

Description: As mentioned above, we utilize word-of-mouth, information obtained from community partners, Advisory and Executive Committee. We also utilize feedback received through formal TIRN monitorings to identify areas for improvement. In the past year, we have been utilizing QR codes to seek input after 211 participation in events to better gauge areas for improvement.

Further, we are required to schedule a minimum number of follow-ups which will also include a customer service satisfaction/quality assurance survey component. Follow-up calls are normally expected to be made within two business days from the original call if the client is in agreement for a follow-up. Our selection criteria is that the client be in Concho Valley region, with the exception of crisis calls.

#9 (S25) - How do you use outcomes information you obtain (see Standard 25.8)?

Description: Information received is evaluated at an Administrative level, then program level. We discuss way to improve and strategize on how to implement. Some common suggestions may be on how to better promote services to hard-to-reach audiences, perhaps incorporate more evening or weekend opportunities to complete outreach activities. As for call volume, an ongoing suggestion is to have more trained staff to increase phone capacity; however, the funding we receive, which is based on the Concho Valley population, we do have ample staffing if we only handled Concho Valley calls. Since calls route statewide, we do often receive the feedback to have more staff on the phone lines.

#10 (S25) - The purpose of program evaluation is to examine the viability of its I&R program, the effectiveness of its services, its appropriate involvement in the community and its overall impact on the people it serves. Provide two examples of things you learned from an evaluation and the I&R program changes you made in response (see Standard 25.9).

Minimum expectation: Information gathered during the process has been used to improve service delivery outcome(s).

Description: Any feedback we receive, whether positive or negative, is utilized to communicate amongst our team to determine any reasonable changes that can be made. We are extremely aware about how easy it is to focus on complaints, so we equally celebrate the acknowledgements our individual staff or team receives from callers, community partners, state or national partners.

Concho Valley utilizes the top ten unmet needs per quarter to research region for additional agencies who fit inclusion criteria and who may want to be included in 211 database. Data used for TIRN Quarterly reports based on the Quality Assurance Report allows managers and director to address any identified areas that need improvement with call specialists.

The Quality Assurance indicators for the Resource Database are addressed in the Database Review phase of the accreditation process.

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- Home
- My Drive
- Computers
- Shared with me
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- Starred
- Spam
- Trash
- Storage

38.8 MB of 15 GB used

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Name	Date modified
OE 33 c - Record Retention Appendices-Sched for Local Gov...	Dec 11, 2025
OE026 - FY-2025 Roster - CVCOG.pdf	Dec 11, 2025
OE027 - Bylaws_amended_10_13_2021 - CVCOG.pdf	Dec 11, 2025
OE028 - Bylaws_amended_10_13_2021 - CVCOG - Policies a...	Jan 8
OE029 -Nov 2025 Employee Handbook - CVCOG.pdf	Dec 10, 2025
OE030a - CVCOG 211 Leadership Initiative.docx	Jan 8
OE030b - Business Code of Ethics.doc	Jan 8
OE032 - FINAL EEO Policy - July 2025 - CVCOG.pdf	Dec 10, 2025
OE033a - RECORDS MANAGMENT POLICY - CVCOG.pdf	Dec 11, 2025
OE033b - RECORDS MANAGEMENT PROCEDURES - CVCOG....	Dec 11, 2025
OE034a - Information Technology Policy User Guide_Board ...	Feb 23
OE034b - General IT Operational Procedures and Controls - ...	Dec 11, 2025
OE035a - Executive Finance FY 25-26 Org Chart Oct 2025 - ...	Nov 19, 2025
OE035b -AaA FY 25-26 Org Chart Oct 2025 - CVCOG.docx	Dec 11, 2025
OE035c - CVCOG FY 25-26 Org Chart Aug 2025 - CVCOG.do...	Dec 11, 2025
OE036a - CVCOG Succession Development Plan draft.xlsx	Jan 8
OE036a - CVCOG Succession Plan example.docx	Jan 8
OE036a - Succession Plan example - CVCOG.docx	Dec 11, 2025
OE036b - Succession Development Plan draft - CVCOG.xlsx	Dec 11, 2025
OE037a - Director of AaA Level III Aug 2023 - CVCOG.docx	Dec 10, 2025
OE037b - AaA Operations Manager Level II Nov 2023 - CVC...	Dec 10, 2025
OE037c - 211 I&R Specialist Level III Nov 2023 - CVCOG.docx	Dec 10, 2025
OE037d - AaA Prooram Specialist 211-ADRC Level II Sept 20...	Dec 10, 2025