

211: Advancing the Provincial Consolidated System Information Resources Working Group Minutes, May 19, 2005

Present: Ross Cooling (Community Connection, Collingwood), Barb McLachlan (Information Windsor), Julie Giesbrecht (Information Niagara), John Allec (Findhelp Information Services)
Regrets: Christine Berry (Information Oakville), Ian Kellogg (Findhelp Information Services)
Guest: Cathleen Kelly, Information Services Coordinator, LIFE LINE Rochester

The first of a few special meetings to focus specifically on larger scale 211 database issues.

For example most databases used by 211s (including Alberta's) use a database structure much more relationally complex than that used in Ontario. It's become apparent that this group should provide an informed recommendation by the end of its term as to whether the status quo is satisfactory, or whether – in the long term at least -- the agency/service/site model would enhance 211 service delivery and data maintenance enough to be worth working toward.

The Ontario model, relatively simple and clean, details larger organizations in multiple, relatively siloed records. Some of the specific data in these records is relational (especially with various developments implemented by CIOC) – but only as far as drawing data from “records” in other databases (e.g. index tables, geography tables, etc), not living data from other records in the same database. We have little if no centralized data for specific organizations; if we want data specific to an organization to be repeated in all that organization’s records, that data must usually be manually repeated and maintained.

The Agency/Service/Site model has been around since about 1990. It basically means separating all of an organization’s data into three types of relational clumps -- administrative information about the agency as a whole, information on the agency’s site or sites, and information on each of the agency’s services (including the related indexing). At the information retrieval end of things, when someone calls up a specific service, that service clump is called up along with any relevant agency and location information. (See also excerpt from the AIRS Data Transfer Protocol below.)

Interestingly, Cathleen considers a “record” to mean the same thing as an “organization”, although that record might be extremely complex and involve many sites and services. (Also, "site" and "branch" are used interchangeably.)

This is how most of the I&R software products in the States are structured, e.g. REFER, IRis, Prism (see the attached Prism model, provided by Deborah Woods). IRis apparently got an early lead, but many centres have “traded up” into the more complex REFER system (very roughly maybe \$20,000 for the SQL model, \$5-8000 for regular Access database model). Cathleen wasn't sure whether IRis relationalizes Site data. They all perhaps provide sample software.

Georgia Sales has stressed that the advantages of the system are by far in searching, whether by

counsellors, professionals or the public. If someone is seeking a specific service, only the information from all the data stored for that organization that specifically relates to that service is displayed, saving much time in browsing through unrelated information.

Barb mentioned one concern she'd heard that REFER, for example, might not accommodate multiple administrative layers very well. There are some limitations, Cathleen says, and people have different solutions. Rochester assigns large parts of large organizations as their own "organizations" (eg "Salvation Army. Community and Family Services") whereas she knows some centres would strictly assign each organization one "record", even if it's something as large and varied as the Salvation Army.

Barb thought she remembered something about all this coming up in the pre-Findhelp days of HSIS. John could only remember the move -- subsequently more or less abandoned at CIT -- aiming to subdivide organizations into many more records ("program records"), though still within the same siloed database structure.

The New York State 211 model plan, similar to Ontario's, is to have 8-10 regional call centres. There will perhaps be some data-sharing to come but there has not been a great call for it as yet. Jan Collinson of Taconic Region has a vision to have all their counties' databases combined into one regional database. Each county will maintain their own database and provide it to the call centre on a regular basis.

The AIRS XML data exchange model is constructed around the Agency/Service/Site model, and is annually updated by a team of experts for maximum consistency in data exchange. Cathleen thought this might be a moot advantage, if most in Ontario is using the same software and data exchange works well.

ADVANTAGES (so far)

- refined searching, only giving people the specific information they request
- centralized maintenance of much more data than is currently done
- de-siloing organization records (eg solving John's concerns about Record Type)
- opportunity to re-align the name authority (Barb reminded us that reviving the Name Authority should be a priority soon.)
- alignment with how data is handled by most AIRS members, enhancing common data standards and development.

DISADVANTAGES (so far)

- expense and effort of transition -- cost of software redevelopment, re-editing, re-training

UNSURE

- Print publications? Rochester doesn't currently publish a directory, but Cathleen doesn't remember major problems. She knows REFER has various built-in report formats.

Barb offered to visit Dick Manikowski in Detroit and do some sample work (and will not even claim travel expenses!). Others are to send Barb sample data they'd be interested in seeing converted.

Next (regular) meeting **Tuesday, June 7th, 10 am.**

From “AIRS Data Transfer Protocol” (May 2003)

There are three types of records associated with each organization:

- agency records which contain identifying information about the agency (name, address, telephone number, etc.) as well as a narrative which provides an overview of the agency and all its services;
- service records which describe specific services or related groups of services offered by the agency, some of which may comprise programs; and
- site records that describe the physical locations where services are actually provided.

Service records contain one or more “link” records, which provide specific coded data about each of the services in the service record. These are used in an agency or service search. The ability to construct multiple “link” records allows the user to display and access for each discrete service the eligibility criteria, application procedures, accessibility information, language availability, fees and other information that often varies widely among the different programs and services a single agency offers. Each of the links is connected to the sites where those services are offered and the area served information (which varies between sites) is carried as a part of the connecting link/service site record.