

## Chapter 6 – Resource Management

Resource Management includes how resources will be identified, how they will be updated, who will update them, and the policy for inclusion and exclusion. Resource information can be maintained in an electronic database or in hard copy, but regardless of how the information is maintained, the processes to ensure the resources are up-to-date, accurate and will satisfy the customer's needs must be in place.

 The Resource Management Plan can cover both Staff Resources and information or they can

Resource standards and protocols should include verifying program information, the accuracy of records and that the scope of the database is appropriate for the program goals. Unmet needs (gaps in services) should be documented (and the reason for the unmet need) and communicated to project partners, funders, and other stakeholders.

### *Basics – Resource Management*

- Resource Management Plan
- Can include both staff and information resources or can be separate plans
- Assign staff responsible for maintaining resources
- Procedures for updating resources
- Procedures for inclusion and exclusion of

### Resource Management Plan

The first step should be to draft a Resource Management Plan. Developing a Resource Management Plan will help ensure that the procedures are in place for obtaining and updating the information resources provided to customers. The responsibilities for updating the resources should be clearly defined in the Plan. This is particularly important if there are multiple partners and collaborating organizations and to ensure that the policy and procedures for inclusion and exclusion are shared and implemented by all the partners.

The Resource Management Plan should generally contain the following:

- Responsibilities for overseeing the resource information (Oversight is the Call Center Manager's responsibility, but there is generally one person who has the specific responsibility for securing and maintaining the information resources.) If there are partner organizations, they may be responsible for updating their information on a scheduled basis, but the staff responsible for information resources would be responsible for ensuring that the updates are completed on schedule. If there is an automated system, one staff member may be responsible for entering the data in the system.
- Standard information – classification system and data elements captured for each information resource in a consistent style and format
- Disaster resources

- Schedule for reviewing and updating the information
- Procedures for accessing and using the information
- Policy for inclusion and exclusion

**Resource Data**

The resource data should contain standard information about the organizations included as resources.

At a minimum, the data should contain:

- Agency name
- Name and title of chief executive
- Address – physical and mailing (if different)
- Telephone number and website URL if applicable
- Hours of operation
- Description of services
- Geographic area served
- Population(s) served
- Type of organization – government, non-profit, for profit
- Eligibility requirements for services
- Fees if applicable
- Disability access
- Name of person to contact for updates
- Contact information for name of person to contact for updates – phone and email

**Resource Maintenance**

The procedures that will be followed for updating the resource information should be defined and should include the following.

- Updated annually, at a minimum
- Partner organizations updated quarterly and as changes occur
- Process for handling interim updates
- Process for adding new organizations
- Process for removing closed organizations or those no longer meeting inclusion and exclusion policy
- Verification of accuracy of information

**Inclusion and Exclusion Policy**

- Resources meet needs of community
- Includes government, non-profit, and for-profit resources, depending on center scope
- Policy is consistently applied

- Decisions are unbiased and impartial
- All partner and collaborator organizations follow same policy
- Policy is reviewed annually

An in-depth resource on developing an inclusion and exclusion policy that includes examples is available from the National Association of States United for Aging and Disabilities (NASUAD) website.

<http://www.nasuad.org/sites/nasuad/files/Inclusion%20Exclusion%20Policy%20Development%20Guide%202005.pdf> "