Deciding which resource to include or exclude from a resource directory

Some organizations find it helpful to create a "resource directory" that can be distributed and used to make good referrals. One often overlooked, yet important aspect of planning a directory is deciding upon criteria to determine which service listings are included and which are excluded.

It is important to have these criteria written down for three reasons:

> 1) To help staff and volunteers apply them consistently;
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> 2) So that staff and volunteers can apply them easily without having to make case-by-case decisions; and
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> 3) To make objective evidence available to support decisions which may be protested, either by agencies which object to the fact that they have been excluded from the file or by individuals or organizations which object to the fact that a particular organization has been included in the directory.[1]

Deciding which types of organizations or services you include is directed by your own organizations mission and the group of people you intend to serve. It is difficult to maintain a comprehensive database of all available services, so narrowing your listing by geographic area or other similar criteria may be helpful. When deciding upon criteria for excluding service listings, it is important to note that you are not denying those you aid access to that service – you are only choosing not to formally include it in your organization's portfolio of common referral resources. You can also choose to supplement your listings with other directories; for example many service organization listings are available through 2-1-1 systems, United Way agency listings, or similar directories.

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[1] Manikowski, D. (1995). *Setting Inclusion/Exclusion Criteria: Determining the Scope of a Resource File*. Retrieved 12/23/04, 2004, from http://www.airs.org/downloads/inclusion_exclusion.PDF