



ALLIANCE OF INFORMATION & REFERRAL SYSTEMS (AIRS)



AIRS: Setting the Standards for Information and Referral Services



# 41st I&R Training and Education Conference



June 2-5, 2019

Marriott Marquis Atlanta, Atlanta, Georgia



Co-Sponsored By:  
The National Aging Information  
and Referral Support Center

# AIRS Conference Program

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# Welcome from the President

On behalf of the AIRS Board of Directors, welcome to Atlanta and the 41st Annual Information and Referral Training and Education Conference. AIRS is excited to be “Driving Innovation in I&R” in a city that nurtures innovation. Atlanta’s attitude toward innovation and research resulted in Innovation Leader magazine naming Atlanta one of the top ten cities for innovation.

As in years past, the AIRS Conference Committee, Training Committee and program track managers, national partners and affiliates, have worked tirelessly to bring a variety of quality and innovative sessions to this year’s conference. If your specialty is 211, ADRC, comprehensive I&R, Aging IR&A, Disaster, Health, Military or any other specialized I&R, we are certain you will learn something new at the over 80 workshops, which include three intensives offered on Sunday.

In addition to the symposiums and workshops, you’ll have the opportunity to visit with more than 14 vendors exhibiting their latest and greatest I&R products. Our vendors and sponsors play an invaluable role in the success of the AIRS conference and we appreciate their partnership and support.

The positive feedback received from members last year indicated they were appreciative of the extra time provided for networking and visiting city sights. So, in lieu of an off-site event, you will have time to explore the city, dine with friends, visit vendors or whatever you desire. There will be a list of activities and restaurants at the Georgia AIRS booth in the exhibit hall and in our Guidebook App. We encourage you to arrange a group or get connected with a group of your choice and enjoy these networking opportunities.

Don’t forget to join us at the Newcomers Orientation Sunday afternoon and the Welcome Reception in the exhibit hall on Sunday evening. We also hope you make plans to attend the Tuesday luncheon sponsored by our national aging and disabilities partners and the AIRS Annual Membership Meeting on Wednesday.

Whether this is your first or 41st AIRS Annual Conference, we hope you are energized by the new friends you will meet, the valuable information you will glean from the workshops and innovative tools developed by vendors on display in the exhibit hall.

The AIRS Board of Directors, Georgia AIRS and staff will be available throughout the conference to help answer questions, navigate you to your workshop and anything else you may need. Enjoy the conference and your stay in Atlanta!



**Vicki Mize**, *President of AIRS*





# Welcome from the National Information and Referral Support Center, National Association of States United for Aging and Disabilities (NASUAD)

Dear Colleagues,

Don't miss the 2019 National Aging and Disability I&R/A Symposium. With a pre-conference I&R/A Summit for aging and disability professionals, a full complement of conference workshops, an Aging and Disability Luncheon, and lively conversation throughout the week, the Symposium is essential for keeping apprised of the latest developments in aging and disability Information & Referral/Assistance programs. Join us for an exciting blend of workshops facilitated by national, state, and local professionals from across the country discussing initiatives and innovations in aging and disability I&R/A programs. Gain new ideas from experts and your peers that can inform your organization's programs and services for older adults, people with disabilities, and caregivers.

The National Aging and Disability I&R/A Symposium is convened by the National I&R Support Center at the National Association of States United for Aging and Disabilities (NASUAD) in collaboration with the U.S. Administration for Community Living (ACL), the National Association of Area Agencies on Aging (n4a), and the National Council on Independent Living (NCIL). Through the Symposium, the National I&R Support Center aims to provide information and resources to State Agencies on Aging and Disability, Area Agencies on Aging, Aging and Disability Resource Centers (ADRCs), Centers for Independent Living (CILs) and other I&R/A agencies to enhance the quality of I&R/A systems, partnerships, and service delivery.



**Nanette Relave, MSW**  
*Senior Director, National  
Information and Referral  
Support Center  
National Association of  
States United for Aging  
and Disabilities*



# Welcome from the Department of Defense

Welcome to the AIRS 2019 Conference! This is a time to make new connections and build working friendships that will continue well past the few days of the conference. It's a time to gain knowledge and insights that will empower you in your professional life as you strive to bring the best support you can to your community. I encourage you to make the most of every opportunity to network with fellow I&R professionals.

I invite you to attend some of the "Serving the Military" track workshops. These workshops have been designed to help military and community providers network and learn about resources that focus on helping active duty service members, veterans and their families. Many of you are building veteran-community partnerships and you will find the resources provided in these workshops invaluable.

Thank you for what you have already done to assist service members and veterans. Working together we can ensure those who have fought for our nation get the support they need. Please join us as we learn from each other, network with each other, and have an enriching conference experience.



**Lucinda S. Lorei**  
*Information and Referral  
Program Manager,  
Personal & Professional  
Development,  
(MFR) Marine and  
Family Programs Division  
Headquarters US Marine  
Corps*



# Conference Highlights

## Pre-Conference Intensives

### Sunday, June 2

These three pre-conference training opportunities offer participants the opportunity to explore topics in greater detail. These all-day sessions run concurrently. Pre-registration is required and seating is limited, but tickets may be available that morning.

#### **“The Essentials of Excellent I&R Service Delivery”**

**9:00am - 4:15pm**

**A706, Atrium Level**

**Instructors: Faed Hendry, Findhelp Information Services**

**Altise Street, 211 Virginia**

This workshop is for front-line I&R professionals who are relatively new to the field or for more experienced staff who intend to secure their CRS or CRS-A/D certification. This interactive and participatory session will address the practical application of performance-based competencies, the ‘how-to’ of conducting an effective needs assessment and dealing with a range of client inquiries and types. This Intensive covers all the fundamentals and enhancements involved in delivering a quality I&R service.

#### **“Identifying and Assisting People at Risk of Suicide in an I&R Context”**

**9:00am - 4:15pm**

**A708, Atrium Level**

**Instructors: Shye Louis, National Suicide Prevention Lifeline**

**Emma Potter, Canadian Mental Health Association**

Many Community Resource Specialists are apprehensive about engaging with clients about the issue of suicide and worry that they aren’t prepared to handle such a crisis. This Intensive will help participants overcome that fear and relate the skills they already have as I&R professionals to the skills needed to help a person at risk of suicide. Participants will receive tools and training on how to ask about suicide, listen to the narrative of the person at risk, identify risk factors, and other protective elements and integrate them into safety plans and connections to crisis and other mental health services. This session is aimed at I&R trainers and frontline professionals looking to increase their capacity and understanding around responding to suicide risks.

#### **“An Introduction to Standards-Driven Resource Database Curation”**

**9:00am - 4:15pm**

**A704, Atrium Level**

**Instructors: Laura James, 211 LA County**

**Kathy Sheridan, Michigan 211**

The AIRS Standards on resource database management are the foundation of the everyday quality that is expected from an I&R program. This Intensive will help Resource Database Curators better understand and apply these standards in the context of their work. This session is for resource database professionals who

are relatively new to the field or for more experienced staff who intend to secure their CRS-DC certification. The Intensive will cover all the fundamentals and enhancements involved in creating and maintaining a quality I&R resource database.

#### **National I&R/A Pre-Conference Summit**

**Sunday, June 2nd**

**8:00am - 5:00pm**

**A602, Atrium Level**

Aging and disability I&R/A professionals are invited to join the National Association of States United for Aging and Disabilities (NASUAD), the U.S. Administration for Community Living (ACL), the National Association of Area Agencies on Aging (n4a), and the National Council on Independent Living (NCIL), for an interactive day of information sharing, presentations, and discussion prior to the start of the AIRS Conference.

#### **The Summit includes:**

1. A continental breakfast during which participants can network with their aging and disability I&R/A peers and with staff from ACL, NASUAD, n4a, and NCIL.
2. A welcome and updates from the Aging and Disability Summit Partners (NASUAD, ACL, n4a, and NCIL).
3. Opportunities for discussion and peer-to-peer exchange.
4. A focus on serving individuals with complex needs, including behavioral health needs, with presentations from program leaders at The Arc, the Fuqua Center for Late-Life Depression, and the Atlanta Regional Commission.

This is a unique opportunity during the AIRS conference for aging and disability I&R/A professionals to gather and focus on industry trends, shared challenges, and promising practices. Throughout the Summit, participants will have opportunities to network with aging and disability I&R/A peers from around the country, participate in discussion, learn about innovative strategies for service delivery and partnership, and consider new approaches to aging and disability I&R/A services. There is no charge to attend this event, but pre-registration is requested.



### 211 Network Meeting

**Sunday, June 2**

**1:00pm – 5:00pm**

**A601, Atrium Level**

The annual networking, sharing and information session of 211 providers.

### AIRS Certification Exams

**Sunday, June 2**

**1:30pm**

**L404, Lobby Level**

**Tuesday, June 4**

**2:30pm**

**L404, Lobby Level**

AIRS offers the only internationally recognized credentialing program in the field of Information and Referral. Exams for Community Resource Specialists (CRS), Database Curators (CRS-DC) and Community Resource Specialists in Aging/Disabilities (CRS-A/D) will be given on Sunday, June 2 and Tuesday, June 4. You must be pre-registered and pre-approved through the AIRS National Office to be eligible to take an exam.

### Newcomers Orientation and Welcome

**Sunday, June 2**

**4:30pm - 5:30pm**

**L508, Lobby Level**

All new members and first time attendees are invited to join the AIRS Board of Directors, staff and local hosts to ask questions about AIRS, the conference and the city of Atlanta.

### Software User Group Meeting

**Sunday, June 2**

**9:00am - 3:30pm**

**L401, Lobby Level**

Users of iCarol Software are invited to attend a user group meeting to learn about the latest updates and have your questions answered. Pre-registration is required.

### Welcome Reception in the Exhibit Hall

**Sunday, June 2**

**5:30pm - 6:30pm**

**Atrium Foyer**

Connect with your friends, colleagues and AIRS exhibitors at the opening event of the AIRS conference. Enjoy appetizers and a cash bar (average alcoholic drink cost is \$9.00), while you network and tour the exhibit hall.

### Opening Breakfast

**Monday, June 3**

**8:00am - 9:45am**

**Atrium Ballroom A**

Everyone is encouraged to join us at the opening breakfast. Three keynote speakers will highlight this popular conference kick-off event.

### Aging and Disability Sponsored Luncheon

**Tuesday, June 4**

**12:15pm - 2:00pm**

**Atrium Ballroom A**

Please attend this special luncheon brought to you by The National Aging and Disability I&R/A Support Center and the National Association of States United for Aging and Disabilities (NASUAD), National Association of Area Agencies on Aging (n4a), U.S. Administration on Aging. This luncheon also includes the presentation of the AIRS awards of accreditation. The luncheon is open to everyone.

### AIRS Annual Meeting and Membership Luncheon

**Wednesday, June 5**

**12:00pm - 2:00pm**

**Atrium Ballroom A**

Everyone is encouraged to join us at the annual membership meeting and luncheon including the presentation of AIRS awards and the opportunity to meet AIRS board members.



Historic Fox Theatre in Atlanta, Ga.



## Special Guests

### Opening Breakfast Speaker

**Monday June 3**

**8:00am - 9:45am**

**Atrium Ballroom A**



Steven Carse is the co-founder and visionary at Rainbow Umbrella, King of Pops' parent company. Steven and his brother Nick started King of Pops in 2010 with a single push cart and a shared kitchen in Atlanta. Almost 10 years later they sell pops throughout the South and their business has evolved to include Perfect 10 Distribution, Tree Elves, King of Crops, King of Compost, King of Pups and King of Pops Bar.

### Aging and Disability Sponsored Luncheon Keynote Speaker

**Tuesday, June 4**

**12:15pm - 2:00pm**

**Atrium Ballroom A**



Jay Bulot, Ph.D. is Vice President of Business Development and State Markets at WellSky. He is considered a national expert on aging and disability services, long-term services and supports (LTSS), health policy and assistive technology. Prior to joining WellSky, he was an Associate Director at Navigant, served under three governors as the State

Director for Aging and Adult Services where he was responsible for Older Americans Act, Public Guardianship, Protective Services and Medicaid 1915c waiver programs, President of the National Association of State Units on Aging and Disability, Tenured Associate Professor, Department Head and Research Institute Director.

Jay has worked closely with state and federal leadership on developing performance benchmarking data for recipients of HCBS services. Jay has over 10 years of experience leading the development and implementation of state programs such as 1915c waivers, NWD/Single Entry Point for LTSS, Balancing Incentive Program, Money Follows the Person, and administration of HCBS services. He develops, promotes and maintains relationships with leaders at health systems, government agencies, universities and associations to drive better understanding of the need to integrate health, social and behavioral supports. He has taught graduate level courses in healthcare administration, aging and disability services networks, long-term care administration, research methods and

statistics. As Department Head, he created the first nationally accredited graduate program in long term care administration.

Within WellSky, Jay leads the Human and Social Services efforts on data analytics, machine learning and artificial intelligence. He serves as a resource to customers and stakeholders and provides valuable insight, policy consulting, budget analysis and technical assistance, while empowering them to realize success in areas such as organizational assessment, program development, revenue enhancement, enhancing federal match, interagency collaborations and state planning services.

**Sponsored by:** The National Aging and Disability I&R/A Support Center and the National Association of States United for Aging and Disabilities (NASUAD), National Association of Area Agencies on Aging (n4a), U.S. Administration on Aging

### Annual Meeting and Membership Luncheon Keynote Speaker

**Wednesday, June 5**

**12:00pm - 2:00pm**



**Atrium Ballroom A**

Sarah Ming Hsi has worked in the Information Technology field for more than 25 years and is currently the Chief Information Officer (CIO) for the United Way of Greater Atlanta. At United Way, Sarah's primary focus is leveraging technology and data to make impactful changes in our communities.

Before joining United Way of Greater Atlanta, Sarah served as the CIO for the Metropolitan Atlanta Rapid Transportation Authority (MARTA). During her tenure at MARTA, she brought real-time train arrival time from a 25-year old legacy system to the SmartPhone apps, introduced free Wi-Fi on buses and trains and switched out 6.5 million blue breeze cards to more secured silver breeze cards. Her biggest accomplishment was building a public-and-private partnership to design and install a cellular network for underground stations and tunnels at no cost to MARTA. Before joining MARTA in 2002, Sarah held various IT engineer and architect positions at AT&T, BP, IHG, and Hitachi.

Sarah received her Bachelor of Science degree, magna cum laude, from Georgia State University and her executive Master of Business Administration from Georgia Institute of Technology. She is a certificated project management professional (PMP) and program management professional (PgMP) from the Project Management Institute. In 2016, Sarah received the Georgia CIO of the Year award for the public sector.

As a volunteer, Sarah serves on the advisory board of Georgia CIO Leadership Association, Technology Association of Georgia's Diversity & Inclusion Society, Georgia State University Computer Science Department and co-founded Georgia Professional Manager Association.



# General Information

## Conference and Workshop Evaluation Forms

Your feedback is important and needed to help us plan future conferences. Please take a few extra minutes to complete evaluation forms for each workshop you attend and the overall conference evaluation form. Please note that workshop evaluations can only be submitted via the conference App.

## Continuing Education Units (CEUs)

Continuing Education Units (CEUs) are awarded to each participant who successfully completes conference workshops approved for CEU credits. The CEU is an internationally recognized unit, designed to provide a record of an individual's continuing education accomplishments. One CEU is defined as ten contact hours of participation in an organized continuing education experience under reasonable sponsorship, capable direction, and qualified instruction. Workshops that have been approved for CEU credit are listed on the CEU Form. CEUs will be done electronically, there are no signup sheets needed. Those that have signed up for CEUs will be contacted individually.

### To be awarded CEUs, you will need to do the following:

- Pay a fee of \$35 for AIRS members and \$45 for non-members.

## Name Badges

Your name badge is your admission to workshops, meals and special events, so please be sure to wear it at all times. If you purchased guests tickets, they should have been included in your registration packet. We apologize in advance, but you cannot be admitted to conference functions without your badge! Thank you for your cooperation and understanding.

## Photo Release

Attendees, exhibitors and speakers grant permission to AIRS and their agents to utilize their image, likeness, voice recordings and videos to promote AIRS events. Attendees, exhibitors and speakers waive any right to inspect or approve the finished product(s). Any photos, likeness, voice recordings or videos taken of attendees, exhibitors and speakers at the conference, becomes the sole and exclusive property of AIRS.

**PLEASE NOTE:** Due to the nature of our sessions and to minimize disruptions, when there is a "session full" notice on the door, you will not be allowed to enter the session. Please check another session to attend that still has space available.

## United Way Flexible Credits

United Ways can use flexible credits to offset reasonable registration, travel, hotel and meal expenses for the 2017 AIRS Conference. Each United Way attendee will receive an online travel reimbursement form following the conference. Once this form is sent, it must be completed within 10 business days, after which further reimbursements cannot be processed. Each attendee who requests travel & expense reimbursement from flexible credits will be charged a processing fee of \$35, regardless of the current balance of their United Way's flexible credit account. If you have any questions about flexible credits, please contact [learning.opportunities@unitedway.org](mailto:learning.opportunities@unitedway.org).




State Capitol, Atlanta



# Schedule at a Glance

## Saturday, June 1

211 Affiliate Meeting – A707  Atrium Level	12:30pm	5:00pm
Registration – Atrium Foyer	6:00pm	8:00pm

## Sunday, June 2

Registration - Atrium Foyer	7:00am	6:00pm
National I&R/A Pre-Conference Summit - A602, Atrium Level	8:00am	5:00pm
iCarol User Group - L401, Lobby Level	9:00am	3:30pm
The Essentials of I&R Service Delivery Intensive - A706, Atrium Level	9:00am	4:15pm
Identifying and Assisting People at Risk of Suicide Intensive - A708, Atrium Level	9:00am	4:15pm
Introduction to Standards-Driven Resource Database Curation Intensive - A704, Atrium Level	9:00am	4:15pm
211 Network Session - A601, Atrium Level *For 211s Only	1:00pm	5:00pm
AIRS Certification Exams - L404, Lobby Level	1:30pm	3:30pm
Newcomers Orientation and Welcome - L508, Lobby Level	4:30pm	5:30pm
Welcome Reception - Atrium Foyer	5:30pm	6:30pm

## Monday, June 3

Registration - Atrium Foyer	7:00am	5:00pm
Opening Breakfast - Atrium Ballroom A	8:00am	9:45am
Exhibits Open - Atrium Foyer	9:30am	5:00pm
Workshops	10:00am	11:15am
Lunch on your own	11:30am	1:00pm
Workshops	1:00pm	2:15pm
Refreshment Break in Exhibit Hall - Atrium Foyer	2:30pm	3:00pm
Workshops	2:45pm	4:00pm

## Tuesday, June 4

Registration - Atrium Foyer	8:00am	6:00pm
Breakfast on your own		
Workshops	8:45am	10:00am
Exhibits Open - Atrium Foyer	9:30am	4:00pm
Refreshment Break in Exhibit Hall - Atrium Foyer	10:00am	10:30am
Workshops	10:30am	11:45pm
Aging and Disability Sponsored Luncheon (open to everyone) - Atrium Ballroom A	12:15pm	2:00pm
Workshops	2:00pm	3:15pm
AIRS Certification Exams - L404, Lobby Level	2:30pm	4:30pm

## Wednesday, June 5

Registration - Atrium Foyer	8:00am	12:00pm
Workshops	9:00am	10:15am
Workshops	10:30am	11:45am
Annual Meeting and Membership Luncheon (open to everyone) - Atrium Ballroom A	12:00pm	2:00pm
Workshops	2:15pm	3:15pm
Conference Adjourns	3:15pm	

# Workshops by Date and Time

## Monday, June 3

### 10:00am - 11:15am

- A-1: "Connecting Youth with Disabilities in Poverty: PROM-ISE Lessons Learned" A601, Atrium Level
- A-2: "Supports and Tools for Elder Abuse Prevention from NCEA and n4a" A704, Atrium Level
- B-1: "One Continuum: Building a Statewide 211 Coordinated Care Delivery System for North Carolina" A602, Atrium Level
- C-1: "Veterans Justice Program: The VA's Collaboration with Veterans Treatment Courts" A701, Atrium Level
- D-1: "Disaster Planning is Everyone's Responsibility" A708, Atrium Level
- E-1: "What Color Are Your Socks? Asking Demographics and Feeling OK About It" L401, Lobby Level
- F-1: "Operation Overnight: The Goal of Being 24/7" A706, Atrium Level
- G-1: "Wrangling the Pumpkin Patch: Translating Taxonomy in I&R Training" A707, Atrium Level
- H-1: "Open Sesame: Three Models for Resource Data Sustainability through Open Systems" A703, Atrium Level
- J-1: "Introduction to Funding Programs: Grant Proposals and Sustainability" A705, Atrium Level

## Monday, June 3

### 1:00pm - 2:15pm

- A-3: "Every Ride Counts: An Information and Education Campaign Helping Local Programs Promote Transportation Options" A601, Atrium Level
- A-4: "Developments in Aging and Disability Policy: A National Perspective" Part One A704, Atrium Level
- B-2: "How 211 Can Impact Birth Outcomes and Infant Mortality" A602, Atrium Level
- C-2: "Building Healthy Military Communities Pilot" A701, Atrium Level
- D-2: "A Unique Partnership Collects Disaster Survivor Information that Enhances Recovery" A708, Atrium Level
- E-2: "Five Keys to Conquer Stress for Enhanced Communication and Improved Work Performance" Part One L401, Lobby Level
- F-2: "Strategic Partnerships: How to Bring Macro-Level Thought to Micro-Level Application" A706, Atrium Level
- G-2: "From Atlanta with Love: How We Keep our Resource Database Relevant and Awesome" A707, Atrium Level
- H-2: "Crash Course on Data Exchange and Data Standards" A703, Atrium Level
- J-2: "Off Site and Without Sight" A705, Atrium Level

## Monday, June 3

### 2:45pm - 4:00pm

- A-5: "Developments in Aging and Disability Policy: A National Perspective" Part Two A704, Atrium Level
- A-6: "ADRC Partnerships within the Healthcare Community and Beyond" A601, Atrium Level
- B-3: "Analog and Digital Impact" A602, Atrium Level
- C-3: "Continuing to Serve" A701, Atrium Level
- D-3: "Two Storms in Two years: Best Practices and Lessons Learned from Hurricanes Matthew and Florence" A708, Atrium Level
- E-3: "Five Keys to Conquer Stress for Enhanced Communication and Improved Work Performance" Part Two L401, Lobby Level
- F-3: "Collaboration Building: Step-by-Step" A706, Atrium Level
- G-3: "Oh, the Places Your Resource Data Could Go!" A707, Atrium Level
- J-3: "The Ins and Outs of Social Determinantes of Health" A705, Atrium Level

## Tuesday, June 4

### 8:45am - 10:00am

- A-7: "Public Transportation à la Mode: Community Options and Accessibility" A704, Atrium Level
- A-8: "Strengthening Your Service Delivery by adding an Assistive Technology Component" Part One A601, Atrium Level
- B-4: "New 211 Pathways for all your Community through the National Text Platform (NTP) 898-211" Part One A602, Atrium Level
- C-4: "The Extra Mile in Customer Service" A701, Atrium Level
- D-4: "How Can your I&R Respond to Active Shooter/Mass Casualty Incidents" Part One A708, Atrium Level
- E-4: "Feelin' Peachy! Empathy's More Than A Feeling" L401, Lobby Level
- F-4: "Winning Grants: How to Turn No Into Yes" A706, Atrium Level
- G-4: "Taxonomy 101" Part One A707, Atrium Level
- H-3: "I&R and the New Data Economy" A703, Atrium Level
- J-4: "Talking 'Bout Your Generation: Intergenerational Volunteer Management" A705, Atrium Level



## Workshops by Date and Time continued

### Tuesday, June 4

**10:30am - 11:45am**

- A-9: "Strengthening Your Service Delivery by adding an Assistive Technology Component" Part Two A601, Atrium Level
- A-10: "Identifying and Supporting Victims of Elder Abuse on Hotlines" A704, Atrium Level
- B-5: "New 211 Pathways for all your Community through the National Text Platform (NTP) 898-211" Part Two A602, Atrium Level
- C-5: "Self-Care for Busy People" A701, Atrium Level
- D-5: "How Can your I&R Respond to Active Shooter/Mass Casualty Incidents" Part Two A708, Atrium Level
- E-5: "I&R Bootcamp" L401, Lobby Level
- F-5: "Connect the Unconnected through Community Information Exchanges" A706, Atrium Level
- F-6: "AIRS Accreditation: What's New?" A705, Atrium Level
- G-5: "Taxonomy 102" Part Two A707, Atrium Level
- H-4: "How Data Biases are Affecting Your Decisions: Common Decision-Making Pitfalls" A703, Atrium Level

### Tuesday, June 4

**2:00pm - 3:15pm**

- A-11: "Benefits Outreach: Practices that Work" A601, Atrium Level
- B-6: "Help Stop Human Trafficking: Dial 211" A602, Atrium Level
- C-6: "Combined Arms Integrated Technology Development: A Timeline on Backbone Technology" A701, Atrium Level
- D-6: "Working with VOAD (Voluntary Organizations Active in Disaster) to Provide I&R Services during the Disaster Cycle" A708, Atrium Level
- E-6: "Digging Deeper, The Art of Asking Questions" A706, Atrium Level
- E-7: "Grief and Bereavement: Empowering When Someone is Hurting" A704, Atrium Level
- F-7: "Creating an Online Training Program for Community Resource Specialists: A Test Case" A707, Atrium Level
- J-5: "Building an Effective Closed-Loop Referral Network to Address Social Determinants" A703, Atrium Level
- J-6: "What To Do Now To Be Ready for HIPAA Compliance" A708, Atrium Level

### Wednesday, June, 5

**9:00am - 10:15am**

- A-12: "Protection and Advocacy for At-Risk Adult Victims of Benefits Trafficking" A601, Atrium Level
- A-13: "Alzheimer's Care: Person-Centered Strategies for Communication and Challenging Behaviors" A704, Atrium Level
- B-7: "How to Lose a Donor in 10 Days" A602, Atrium Level
- C-7: "Sneak Peak: Military OneSource" A701, Atrium Level
- D-7: "Before Disaster Strikes: Disaster Relief Resources for Aging and Disability Populations" A708, Atrium Level
- E-8: "Improving Client Engagement via Phone-Based Services" A704, Atrium Level
- G-6: "Build the Foundations of a Peach-tacular Resource Database" Part One A707, Atrium Level
- H-5: "The What's, How's, and Why's of Interoperability: Busting Resource Database Silos and Building Resourceful Ecosystems" A703, Atrium Level,
- J-7: "The New Emergency, Treat and Transport (ET3) Model: How I&Rs can Support Community Navigation Across the Transportation Continuum" A705, Atrium Level

### Wednesday, June, 5

**10:30am - 12:00pm**

- A-14: "Social Security for Seniors and People with Disabilities" A705, Atrium Level
- B-8: "Integrating 211 into Hospitals" A602, Atrium Level
- D-8: "Team Rubicon USA, Volunteer Disaster Response and Recovery" A708, Atrium Level
- F-8: "Developing Partnerships and Building Your Volunteer Base" A706, Atrium Level
- G-7: "Build the Foundations of a Peach-tacular Resource Database" Part Two A707, Atrium Level
- H-6: "Salesforce: A Platform for I&R Innovation" A703, Atrium Level
- J-8: "Bringing Health Literacy Compliance to I&R Services" A701, Atrium Level

### Wednesday, June, 5

**2:15pm - 3:15pm**

- E-9: "Service Delivery Open House" A708, Atrium Level
- F-9: "I&R Management Open House" A705, Atrium Level
- G-8: "Resource Database Open House" A703, Atrium Level

# Workshops by Track and Description

## AGING AND DISABILITIES TRACK

*Brought to you by the National Association of States United for Aging and Disabilities (NASUAD).*

The sessions on this track are geared towards issues distinct to the operation of Aging/Disabilities services. However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to Aging/Disabilities providers. Remember, anyone can attend any session and that everything in I&R and I&A is connected.

### Monday, June 3

10:00am - 11:15am

A601, Atrium Level

#### A-1: "Connecting Youth with Disabilities in Poverty: PROMISE Lessons Learned"

Engaging and connecting youth with disabilities in poverty and their families to services presents unique challenges. Promoting the Readiness of Minors in Supplemental Security Income (PROMISE) is a 5 year research grant funded by the U.S. Department of Education. The six sites involved provided interventions to improve academic, career, and financial outcomes for youth with disabilities receiving supplemental security income (SSI) benefits and their families. The presenters will share lessons learned about ways to engage, and how to provide information and referrals that yield results.

*Jade Gingerich, Maryland Department of Disabilities, Baltimore, Maryland; Ellie Hartman, Department of Workforce Development, Madison, Wisconsin*

### Monday, June 3

10:00am - 11:15am

A704, Atrium Level

#### A-2: "Supports and Tools for Elder Abuse Prevention from NCEA and n4a"

Everyone, regardless of age, deserves to live healthy and happy lives that are free from abuse. Older people are mistreated more often than we think. In this workshop, representatives from the National Center on Elder Abuse (NCEA) and National Association of Area Agencies on Aging (n4a) will introduce a collection of practical and customizable tools your agency can use to engage and educate your community about the role everyone can play in preventing elder abuse. This session is relevant to anyone committed to creating a society free from abuse and neglect.

*Kimmy Moon, Project Assistant, National Center on Elder Abuse at the Keck School of Medicine at the University of Southern California, Alhambra, California*

### Monday, June 3

1:00pm - 2:15pm

A601, Atrium Level

#### A-3: "Every Ride Counts: An Information and Education Campaign Helping Local Programs Promote Transportation Options"

Community Resource Specialists recognize the importance of coordinating with local programs to effectively and efficiently get the word out about transportation services in their communities. This session will provide an overview of "Every Ride Counts" a new national campaign recently launched by the National Aging and Disability Transportation Center that is designed to support local community efforts to promote transportation programs and connect individuals in the community with these services. Those who attend will obtain access to organized and easy-to-use materials for better promotion of the services.

*Melissa Gray, National Association of Area Agencies on Aging (n4a), Washington, District of Columbia*

### Monday, June 3

1:00pm - 2:15pm

A704, Atrium Level

#### A-4: "Developments in Aging and Disability Policy: A National Perspective" Part One

Join this session to learn about the latest in aging and disability policy from your national I&R/A partners. This session will provide I&R/A professionals with a review of current issues in aging and disability policy, financing, and service delivery. During Part I, presenters will share key updates and developments from the U.S. Department of Health and Human Services, Administration for Community Living (ACL), and the National Association of Area Agencies on Aging (n4a), with a focus on the aging network. *Sherri Clark, Administration for Community Living, U.S. Department of Health and Human Services, Washington, District of Columbia; Autumn Campbell, National Association of Area Agencies on Aging (n4a), Washington, District of Columbia*

### Monday, June 3

2:45pm - 4:00pm

A704, Atrium Level

#### A-5: "Developments in Aging and Disability Policy: A National Perspective" Part Two

Join this session to learn about the latest in aging and disability policy from your national I&R/A partners. This session will provide I&R/A professionals with a review of current issues in aging and disability policy, financing, and service delivery. During Part II, presenters from the National Council on Independent Living (NCIL) and the National Association of States United for Aging and Disabilities (NASUAD) will share key updates and developments in disability policy, Medicaid, and home and community-based services.

*Roger Howard, LINC, Boise, Idaho; Damon Terzaghi, National Association of States United for Aging and Disabilities, Washington, District of Columbia*

## Workshops by Track and Description continued

### Monday, June 3

2:45pm - 4:00pm

A601, Atrium Level

#### A-6: "ADRC Partnerships within the Healthcare Community and Beyond"

Partnership building is crucial to a successful ADRC program. In this session, learn key steps on how to navigate and engage partners within the healthcare community in your region. From identifying healthcare champions, designing an MOU, resource mapping, to ultimately having them sit at your Advisory Committee table, this session is for you!

*Richard Flores, Lower Rio Area Agency on Aging-Rio-Net, Weslaco, Texas*

### Tuesday, June 4

8:45am - 10:00am

A704, Atrium Level

#### A-7: "Public Transportation a la Mode: Community Options and Accessibility"

Join this interactive session featuring an exploration of community transportation options including public and private modes and services. Examine the unique ride needs and supports for older adults and people with disabilities. The Atlanta area CIL, disABILITY LINK, will offer a discussion on their experience with finding rides, including the ADA paratransit eligibility process. The session will conclude with an overview of coordination efforts, partnerships for identifying resources and great ideas to share.

*Ken Thompson, Easterseals/National Aging and Disability Transportation Center, Washington, District of Columbia; Ken Mitchell, disABILITY LINK, Tucker, Georgia*

### Tuesday, June 4

8:45am - 10:00am

A601, Atrium Level

#### A-8: "Strengthening Your Service Delivery by adding an Assistive Technology Component" Part One

Assistive Technology (AT) ranges on a continuum from low tech (walkers and bath benches) to high tech (tele-presence, bath tub lifts, environmental controls, etc.). In this fun and interactive session, participants will not only learn what low cost technologies are available, but also how the ADRCs in Georgia have reduced waiting lists, increased the morale of clients and staff, and built new partnerships with key community agencies. The first half of the session will be informational, and the second half will be interactive and hands-on with live AT demonstrations.

*Cheney Roper Magusiak, Georgia Department. of Human Services, Atlanta, Georgia; Rachel Wilson, Georgia Tech, Atlanta Georgia; Denise Howard, LIFE Inc., Center for Independent Living, Savannah, Georgia; Elaine Harkin, Legacy Link AAA, Gainesville, Georgia; Ginger Ragans, Legacy Link AAA, Gainesville, Georgia; Peggy Luukkonen, Coastal Georgia AAA, Darien, Georgia*

### Tuesday, June 4

10:30am - 11:45am

A601, Atrium Level

#### A-9: "Strengthening Your Service Delivery by adding an Assistive Technology Component" Part Two

Assistive Technology (AT) ranges on a continuum from low tech (walkers and bath benches) to high tech (tele-presence, bath tub lifts, environmental controls, etc.). In this fun and interactive session, participants will not only learn what low cost technologies are available, but also how the ADRCs in Georgia have reduced waiting lists, increased the morale of clients and staff, and built new partnerships with key community agencies. The first half of the session will be informational, and the second half will be interactive and hands-on with live AT demonstrations.

*Cheney Roper Magusiak, Georgia Department. of Human Services, Atlanta, Georgia; Rachel Wilson, Georgia Tech, Atlanta Georgia; Denise Howard, LIFE Inc., Center for Independent Living, Savannah, Georgia; Elaine Harkin, Legacy Link AAA, Gainesville, Georgia; Ginger Ragans, Legacy Link AAA, Gainesville, Georgia; Peggy Luukkonen, Coastal Georgia AAA, Darien, Georgia*

### Tuesday, June 4

10:30am - 11:45am

A404, Atrium Level

#### A-10: "Identifying and Supporting Victims of Elder Abuse on Hotlines"

The VictimConnect Resource Center is a national hotline providing resources and referrals to those impacted by crime. The anonymous nature of the service requires staff to be trained to recognize red flags to determine when a call may be referencing elder abuse. Most hotlines will encounter the 1 in 10 older adults who experience abuse and neglect. This workshop covers practical tips to assist in identifying elder abuse victims, connecting them to local resources and providing emotional support.

*Keeley Frank, National Center for Victims of Crime, Arlington, Virginia*

### Tuesday, June 4

2:00pm - 3:15pm

A601, Atrium Level

#### A-11: "Benefits Outreach: Practices that Work"

Many states and local communities are implementing innovative practices to increase enrollment in benefit programs that assist financially vulnerable older adults and persons with disabilities. Speakers will share state and local practices for benefit outreach, assessment, and enrollment. This session will present the results from a NASUAD survey of state aging and disability agencies on their systems and practices for benefit assessment and enrollment. We will also review what outreach tactics and messages work best with diverse communities.

*Samantha Gardner, National Association of States United for Aging and Disabilities (NASUAD), Washington, District of Columbia; Brandy Bauer, National Council on Aging (NCOA), Arlington, Virginia; Esteban Gonzalez, Atlanta Community Food Bank, Atlanta, Georgia*



### Wednesday, June 5

9:00am - 10:15am

A601, Atrium Level

#### A-12: "Protection and Advocacy for At-Risk Adult Victims of Benefits Trafficking"

Benefits Trafficking is an emerging crime characterized by the recruitment, harboring, and undue influence of older adults and adults with disabilities for the purpose of gaining access to and exploiting their benefits and life savings. Georgia is the first state to take legislative action and identify Benefits Trafficking as a felony crime. Addressing Benefits Trafficking requires a multi-disciplinary effort involving a variety of agencies responsible for public safety, aging and disability services, financial services, emergency response, and victim resource connection.

*Anna Thomas, Division of Aging Services Forensic Unit, Atlanta, Georgia; Lindsay Greenwa, Division of Aging Services Forensic Unit, Atlanta, Georgia*

### Wednesday, June 5

9:00am - 10:15am

A704, Atrium Level

#### A-13: "Alzheimer's Care: Person-Centered Strategies for Communication and Challenging Behaviors"

Do you know how to talk to your clients about communicating with a person living with dementia? Do you know what resources are available for caregivers and PLWDs? Join us to learn person-centered care strategies for effective communication and challenging dementia-related behaviors. Access the rich resources for caregivers and PLWDS provided by the Eldercare Locator, Alzheimer's Association, and other community agencies, including an in-depth description of I&R assessment and care consultation services.

*Mariam Schrage, Alzheimer's Association, Chicago, Illinois; Amber Meadows-Dillard, Atlanta Regional Commission, Atlanta, Georgia*

### Wednesday, June 5

10:30am - 11:45am

A601, Atrium Level

#### A-14: "Social Security for Seniors and People with Disabilities"

The Social Security Administration touches the lives of millions of older Americans and people with disabilities. Our programs serve as a vital financial protection during times of hardship, transition, and uncertainty. As baby boomers age and an unprecedented number of Americans enter their most disability-prone years, it is critical that SSA collaborates with I&R organizations. Join us for an interactive session about our key programs and services. We will show you how you can help others access some of our most requested services: Benefit Verification Letter, Medicare Replacement Cards, New Wage Reporting option for SSI claimants, and other services. In addition, presenters will answer all your Social Security questions!

*Social Security Administration, Atlanta, Georgia*

## 211 TRACK

### Brought to you by 211 US Steering Committee

The sessions on this track are geared towards issues distinct to the operation of 211 are sessions in other tracks relevant to 211 providers. Remember, anyone can attend any session and that everything in I&R and I&A is connected.

### Monday, June 3

10:00am - 11:15am

A602, Atrium Level

#### B-1: "One Continuum: Building a Statewide 211 Coordinated Care Delivery System for North Carolina"

NCCARE360 is the first statewide coordinated care network, with a robust data repository of shared resources that connects healthcare and human services partners together to collectively provide the opportunity for health for all North Carolinians. In this session, the three core partners of this groundbreaking work will share the background on how their partnership came together, an overview of the work completed thus far, and the plans moving forward. The session will include a demo of the model and the opportunity for attendees to ask the partners questions and to receive tips and advice on how to duplicate the model in their own communities.

*Heather Black, United Way of North Carolina; Taylor Justice, Unite Us; Andrew Benson, Expound Decision Systems, Grimsby, Ontario*

### Monday, June 3

1:00pm - 2:15pm

A602, Atrium Level

#### B-2: "How 211 Can Impact Birth Outcomes and Infant Mortality"

This workshop will provide an overview of Cradle Kalamazoo, and how Gryphon Place and the United Way of Battle Creek and Kalamazoo have built a partnership with local agencies to connect expectant mothers with specific resources to increase positive birth outcomes. There will be a conversation about the role that 211 can play in communities where infant mortality is a struggle and how building relationships with other agencies in the community can have a deep impact on improving birth outcomes and other aspects of family lives.

*Abby Wells, Gryphon Place, Kalamazoo, Michigan; Nadine Bryant, Gryphon Place, Kalamazoo, Michigan; Maricela Alcala, Gryphon Place, Kalamazoo, Michigan*

### Monday, June 3

2:45pm - 4:00pm

A602, Atrium Level

#### B-3: "Analog and Digital Impact"

Across the network, 211s talk to more than 35,000 people each day, loaded with stories and statistics, no-one is better poised to tell the story of a community better than a local 211. This workshop will combine storytelling with data technology to better equip your 211 with the tools to highlight and demonstrate your impact.

*Joshua B. Pedersen, United Way Worldwide, Alexandria, Virginia*

## Workshops by Track and Description continued

### Tuesday, June 4

8:45am - 10:00am

A602, Atrium Level

#### B-4: "New 211 Pathways for all your Community through the National Text Platform (NTP) 898-211" Part One

Learn about the many ways 211s are using automated and two-way texting to deliver effective service with remarkable outcomes! Uncover ways to gain funding and resource support. This national panel will include speakers addressing the enormous capacity that has emerged in texting over the past 4 years. Learn about critical new services and walk away knowing how to use the National Text Program to add power to your efforts and build new partnerships. Showcasing: Integrated two-way live texting and automated I&R, Opioid Text Program, ReadyNJ Disaster Preparedness and Emergency Services, Suicide Prevention-Crisis Intervention, and Human Trafficking.

*Melissa Acree, NJ 211 Partnership, East Hanover, New Jersey; Marioly Botero, United Way of Greater Atlanta, Atlanta, Georgia; Elizabeth Donoghue, 211 Brevard, Rockledge, Florida; Ciara Doyle, 211info, Portland, Oregon; Melissa McCoy, 211 United Way Central Iowa, Des Moines, Iowa; Tim Sullivan, Director, Washington 211, Yakima, Washington*

### Tuesday, June 5

10:30am - 11:45am

A602, Atrium Level

#### B-5: "New 211 Pathways for all your Community through the National Text Platform (NTP) 898-211" Part Two

Learn about the many ways 211s are using automated and two-way texting to deliver effective service with remarkable outcomes! Uncover ways to gain funding and resource support. This national panel will include speakers addressing the enormous capacity that has emerged in texting over the past 4 years. Learn about critical new services and walk away knowing how to use the National Text Program to add power to your efforts and build new partnerships. Showcasing: Integrated two-way live texting and automated I&R, Opioid Text Program, ReadyNJ Disaster Preparedness and Emergency Services, Suicide Prevention-Crisis Intervention, and Human Trafficking.

*Melissa Acree, NJ 211 Partnership, East Hanover, New Jersey; Marioly Botero, United Way of Greater Atlanta, Atlanta, Georgia; Elizabeth Donoghue, 211 Brevard, Rockledge, Florida; Ciara Doyle, 211info, Portland, Oregon; Melissa McCoy, 211 United Way Central Iowa, Des Moines, Iowa; Tim Sullivan, Director, Washington 211, Yakima, Washington*

### Tuesday, June 4

2:00pm - 3:15pm

A602, Atrium Level

#### B-6: "Help Stop Human Trafficking: Dial 211"

What if we could help stop human trafficking by remembering 3 easy numbers, 211? 211 Miami, the Women's Fund of Miami-Dade, 1 Billion Rising and other local stakeholders have partnered to bring awareness to this ongoing and critical issue with

breakthrough messaging and expanded collaborations. In this workshop, we will showcase recent outdoor awareness campaigns and discuss how 211 plays a large role in connecting victims to resources such as the State Attorney's office, the National Polaris Hotline, emergency shelters and other essential needs. This workshop is intended for everyone working with vulnerable populations.

*Marya Meyer, 1 Billion Rising, Miami, Florida; Cora Patterson, Jewish Community Services of South Florida, Miami, Florida; Kathy Anderson, The Women's Fund Miami-Dade*

### Wednesday, June 5

9:00am - 10:15am

A602, Atrium Level

#### B-7: "How to Lose a Donor in 10 Days"

Keeping funders engaged long-term with your 211 is critical for sustained success. This workshop will explore ways your 211 can solicit and retain funders, or lose them in 10 days. If you are internal to a United Way or independent of a United Way, we will discuss opportunities to keep your 211 relevant for a lot more than just 10 days.

*Joshua B. Pedersen, United Way Worldwide, Alexandria, Virginia*

### Wednesday, June 5

10:30am - 11:45am

A602, Atrium Level

#### B-8: "Integrating 211 into Hospitals"

This session shows how 211s and hospitals can partner together to support the social determinants of health. It will provide examples of how 211 can become an integral part of exit interviews, annual patient visits, and specialized health referrals in order to prevent reoccurring patient visits. When patients return after being discharged, most of the time they lack essential basic needs that health care staff are not trained to identify. Learn how your 211 can provide a brief training with healthcare staff so they are more aware of how to educate patients to reach out for help through 211 for themselves or someone they know in need.

*Fratina McCraney, United Way of the Midlands, Omaha, Nebraska*



Georgia Aquarium, Atlanta

### SERVING THE MILITARY TRACK

The sessions on this track are geared towards issues distinct to providing I&R services to the broad military community (including families, veterans and reservists). However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to military I&R providers. Remember, anyone can attend any session and that everything in I&R is connected.

#### Monday, June 3

10:00am - 11:15am

A701, Atrium Level

##### C-1: "Veterans Justice Program: The VA's Collaboration with Veterans Treatment Courts"

This key component of the Veterans Justice Program is a way to avoid unnecessary criminalization of mental illness and extended incarceration among Veterans by ensuring that eligible Veterans in contact with the criminal justice system have access to VA mental health and substance services. This information would be appropriate for professionals working with justice-involved veterans and/or military personnel. An individual with real-life experience will be present to discuss his complete experience with the Veterans Treatment Courts.

*Katherine Andrade, Veterans Administration, Atlanta, Georgia; Dione Shekon, Veterans Administration, Atlanta, Georgia*

#### Monday, June 3

1:00pm - 2:15pm

A701, Atrium Level

##### C-2: "Building Healthy Military Communities Pilot"

The Department of Defense (DoD) is developing a comprehensive plan to improve internal and external policies and programs that support the well-being of Service members and their families. The Building Healthy Military Communities (BHMC) Pilot supports the Secretary of Defense's effort to grow DoD partnerships designed to enhance service member readiness. The goal of BHMC is to coordinate and integrate existing DoD, federal, state,

regional, and local efforts in support of geographically-dispersed service members, their families, and the communities in which they live.

*Captain Kimberly Elenberg, Office of Personnel and Readiness, Department of Defense, Washington, District of Columbia*

#### Monday, June 3

2:45pm - 4:00pm

A701, Atrium Level

##### C-3: "Continuing to Serve"

No matter the branch of service, veterans have an engrained sense of "mission accomplishment" and a desire to be a part of a team. Finding those opportunities can mean a great deal to the success of an individual's transition back to Hometown, USA. We will focus on three organizations which provide the spirit of teamwork, camaraderie and action to mission, targeting resources that meet an immediate need. While the standard rule of three applies to most I&R requests, when a veteran is asking for VA assistance there needs to only be one well-rounded answer. Military I&R is a growing network of professionals and our resources intermingle with various platforms. We will show how this happens and why we will keep growing.

*Mark Munger, Marine for Life Network, Camp LeJeune, North Carolina*

#### Tuesday June 4

8:45am - 10:00am

A701, Atrium Level

##### C-4: "The Extra Mile in Customer Service"

Customer Service can make or break a client's experience. Ensure they have not only the best service but also feeling of comfort that someone is there for them when they need it most. This session will ensure participants will walk away with new ideas on how to step up their customer service as we share how to go the extra mile. Participants will take away ideas to improve their day to day customer service and potentially improve their trainings.

*Julie Zwiebel, United States Recruiting Command Headquarters, Fort Knox, Kentucky*

#### Tuesday, June 4

10:30am - 11:45am

A701, Atrium Level

##### C-5: "Self-Care for Busy People"

Working in I&R can take its toll, on military I&R providers and civilian programs, on frontline workers and administrative staff. Whether you are responding to inquiries from people in need or working administratively to make sure your program is funded, managed and supervised, appropriate self-care is critical. This session will clarify the need to make self-care a priority. Participants will have a chance to assess their current level of self-care, plan around potential barriers, and create a working self-care plan to take home. This workshop is relevant for both military and civilian providers, regardless of experience or role.

*Shye Louis, National Suicide Prevention Lifeline, Rochester, New York*





## Workshops by Track and Description continued

### Tuesday, June 4

2:00pm - 3:15pm

A701, Atrium Level

#### **C-6: "Combined Arms Integrated Technology Development: A Timeline on Backbone Technology Development from Ideation Through Implementation"**

Combined Arms developed a technology to streamline the connection between veterans and organizations as well as to share live, holistic data with stakeholders in Greater Houston. It became much more. Hear about how this technology helped to drive efficiencies and reduce redundancies in the veteran services landscape. The workshop will cover how to take a technology from concept to concrete reality, how to define your own process and how to select the best partners. This technology application is available for licensing in all communities and is free for veterans to use.

*John Boerstler, Combined Arms System, Houston, Texas; Brian Wilson, Combined Arms System, Houston, Texas*

### Wednesday, June 5

9:00am - 10:15am

A701, Atrium Level

#### **C-7: "Sneak Peak: Military OneSource"**

Take a peek behind the curtain of Military OneSource, the Department of Defense's 24/7 call center and website whose mission is the military community. Discover frequently accessed online tools and call center support, become familiar with state-based outreach services, learn how to connect with resources to take your skills to the next level, and much more. You do not want to miss this interactive session specifically designed for helping professionals.

*Kelly Smith, Office of the Deputy Assistant Secretary of Defense for Military Community and Family Policy, Alexandria, Virginia*

## DISASTER TRACK

The sessions on this track are geared towards issues distinct to the role of I&R in disasters. However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to disaster-related issues. Remember, anyone can attend any session and that everything in I&R is connected.

### Monday, June 3

10:00am - 11:15am

A708, Atrium Level

#### **D-1: "Disaster Planning is Everyone's Responsibility"**

Disaster Planning is everyone's responsibility. Join us as we highlight the steps to creating a successful disaster plan utilizing local and internal resources to meet the immediate needs of individuals in the community. This interactive workshop will focus on the strategies and provide a roadmap on how to ensure the proper resources are available for consumers. The workshop will provide

an outline to leverage for-profit; non-profit; local, county, and state government organizations working as one.

*Shonthenia Edwards, Harris County Area Agency on Aging, Houston, Texas; Mary McNeil, Harris County Area Agency on Aging, Houston, Texas*

### Monday, June 3

1:00pm - 2:15pm

A708, Atrium Level

#### **D-2: "A Unique Partnership Collects Disaster Survivor Information that Enhances Recovery"**

A new Indiana 211 partnership gets the right information to help disaster survivors. The IN 211 intake system captures all the information needed to help after a disaster. This intake process was developed so it was agreed upon by all parties. This saves time and money. Over time, IN 211 will become known as the go-to source to report disaster needs. Presenters will demonstrate how it works and share their unique form and process for the consideration of other states.

*Steven Cain, Indiana 211 Partnership Board member, Indianapolis, Indiana; Larry Cassagne, Indiana Department of Homeland Security, Response and Recovery Division, Indianapolis, Indiana; Catherine McNaughton, Indiana 211 Partnership, Indianapolis, Indiana*

### Monday, June 3

2:45pm - 4:00pm

A708, Atrium Level

#### **D-3: "Two Storms in Two years: Best Practices and Lessons Learned from Hurricanes Matthew and Florence"**

The team at North Carolina 211 had the uniquely unfortunate experience of witnessing two catastrophic storms make landfall on their beautiful State in less than two years. Hear how the team developed the tools they needed to serve the needs of their fellow residents and, most importantly, how they were able to capitalize on the compressed timeline and develop best practices from the lessons learned between the two storms to improve their service delivery. North Carolina 211's exhausting experience becomes your gain.

*Heather Black, NC 211/United Way of North Carolina, North Carolina; Marla Browne, Asheville Call Center, United Way Asheville-Buncombe County, Asheville, North Carolina; Latasha Gerald, American Sexual Health Association, Durham, North Carolina*



Mercedes-Benz Stadium, Atlanta

## Workshops by Track and Description continued

### Tuesday, June 4

8:45am - 10:00am

A708, Atrium Level

#### D-4: "How Can your I&R Respond to Active Shooter/Mass Casualty Incidents" Part One

The Ghost Ship Fire (Oakland), Route 91 Shooting (Las Vegas), Marjory Stoneman Douglas High School Shooting (Parkland) and the Borderline Shooting (Thousand Oaks) were all incidents that required immediate action. 211s collaborated with local and federal agencies to aid during these horrific events. This two-part workshop will include testimonials, a panel for Q&A, along with materials, information and tips so that your 211 can be prepared to assist in the case of an incident with mass casualties.

*Christie O'Melia, Nevada 211, Las Vegas, Nevada, Alison DeJung, Eden I&R, Alameda, California; Kelly Brown, Interface 211, Camarillo, California; Sheila Smith, 211 Broward, Oakland Park, Florida*

### Tuesday, June 5

10:30am - 11:45am

A708, Atrium Level

#### D-5: "How Can your I&R Respond to Active Shooter/Mass Casualty Incidents" Part Two

The Ghost Ship Fire (Oakland), Route 91 Shooting (Las Vegas), Marjory Stoneman Douglas High School Shooting (Parkland) and the Borderline Shooting (Thousand Oaks) were all incidents that required immediate action. 211s collaborated with local and federal agencies to aid during these horrific events. This two-part workshop will include testimonials, a panel for Q&A, along with materials, information and tips so that your 211 can be prepared to assist in the case of an incident with mass casualties.

*Christie O'Melia, Nevada 211, Las Vegas, Nevada, Alison DeJung, Eden I&R, Alameda, California; Kelly Brown, Interface 211, Camarillo, California; Sheila Smith, 211 Broward, Oakland Park, Florida*

### Tuesday, June 4

2:00pm - 3:15pm

A708, Atrium Level

#### D-6: "Working with VOAD (Voluntary Organizations Active in Disaster) to Provide I&R Services during the Disaster Cycle"

I&R services have become integral to many plans developed by Federal, State and local emergency management/Homeland Security entities. The foremost group of non-profit/faith-based organizations working in this arena is VOAD. This interactive workshop will help you learn what VOAD is and how your program can and should participate throughout the disaster cycle. Management and advanced practitioners will be able to identify areas where they can work with governmental and non-profit/Faith based organizations to benefit the residents of your community.

*Jay Burdick, Rhode Island 211 & National Voluntary Organizations Active in Disaster (NVOAD), Providence, Rhode Island*

### Wednesday, June 5

9:00am - 10:15am

A708, Atrium Level

#### D-7: "Before Disaster Strikes: Disaster Relief Resources for Aging and Disability Populations"

When a disaster strikes it means that the situation will be harrowing for everyone for a while. This is especially true for the elderly and others with disabilities, whose needs for specialized equipment and care are not always realized or addressed in recovery plans for the general population. This is why it is important to put time into planning and preparation to help with unmet needs long before a disaster strikes.

*Chris Brand, Friends of Disabled Adults and Children (FODAC), Atlanta, Georgia*

### Wednesday, June 5

10:30am - 11:45am

A708, Atrium Level

#### D-8: "Team Rubicon USA, Volunteer Disaster Response and Recovery"

This presentation from Team Rubicon's volunteer leadership will include who Team Rubicon is and how they help communities affected by a disaster. More importantly, we will share how to request Team Rubicon as a resource for your communities.

*Jeff Covert, Team Rubicon, Georgia*

## I&R SERVICE DELIVERY TRACK

The sessions on this track are geared towards issues distinct to I&R Service Delivery. However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to I&R service delivery issues. Remember, anyone can attend any session and that everything in I&R is connected.

### Monday, June 3

10:00am - 11:15am

L401, Lobby Level

#### E-1: "What Color Are Your Socks? Asking Demographics and Feeling OK About It"

This presentation of an Oregon-based 211 and ADRC, will cover why we collect demographic data, tools for asking the questions, and how the information is used to improve your agency and your community. You will hear from a Community Resource Specialist, a call center manager, and a data analyst about all things 'demo', and learn some tools to improve the process for you and your staff. You'll hear some examples of ways to ask demographics that may be more comfortable for you and your caller. And we will also look at demographic requirements and changes coming from the census and REAL+D, using an equity lens expanding vocabulary around gender identity, race, military/veteran status, and more!

*Ciara Doyle, 211info, Portland, Oregon; Lacey Hanson, Aging and Disability Resource Center of Multnomah County, Portland, Oregon; Nickcolynn Nixon, 211info, Portland, Oregon*

## Workshops by Track and Description continued

### Monday, June 3

1:00pm - 2:15pm

L401, Lobby Level

#### **E-2: "Five Keys to Conquer Stress for Enhanced Communication and Improved Work Performance" Part One**

This is a practical, hands-on workshop where attendees will walk away with tools that can be used right now to help manage stress, improve work/life balance and enhance work outcomes. This workshop, though great for everyone, is perfect for the high-stress, Type A individual that has trouble shutting down, relaxing, meditating and leaving work at work. Learn mindfulness, meditation, affirmations, breath work and the warning signs of stress.

And we'll get some laughs along the way.

*Kathy Gruver, www.KathyGruver.com, Santa Barbara, California*

### Monday, June 3

2:45pm - 4:00pm

L401, Lobby Level

#### **E-3: "Five Keys to Conquer Stress for Enhanced Communication and Improved Work Performance" Part Two**

This is a practical, hands-on workshop where attendees will walk away with tools that can be used right now to help manage stress, improve work/life balance and enhance work outcomes. This workshop, though great for everyone, is perfect for the high-stress, Type A individual that has trouble shutting down, relaxing, meditating and leaving work at work. Learn mindfulness, meditation, affirmations, breath work and the warning signs of stress.

And we'll get some laughs along the way.

*Kathy Gruver, www.KathyGruver.com, Santa Barbara, California*

### Tuesday, June 4

8:45am - 10:00am

L401, Lobby Level

#### **E-4: "Feelin' Peachy! Empathy's More Than A Feeling"**

Empathy is much more than saying "It sounds like (insert feeling here)." Neuroscience tells us we all process empathy through the Supramarginal Gyrus. It is the manner in which we implement that process that is the true measure of our ability to be empathic. This workshop will look at balancing the four types of empathy in such a way that that being empathic does not have to sound like hackneyed psychobabble.

*John Plonski, IMAlive Virtual Crisis Center, Hicksville, New York*

### Tuesday, June 4

10:30am - 11:45am

L401, Lobby Level

#### **E-5: "I&R Bootcamp"**

I&R is so much more than just phone calls. This workshop is a primer for new I&R staff and a refresher for I&R veterans to discuss specific tools and techniques to help you better connect people with services.

*Christopher Moore, Howard County Office on Aging & Independence, Maryland; Tené Young Howard County Office on Aging & Independence, Maryland*

### Tuesday, June 4

2:00pm - 3:15pm

A706, Atrium Level

#### **E-6: "Digging Deeper, The Art of Asking Questions"**

This session will explore barriers to asking questions and how to overcome them, including breaking down the different types of questions and why we ask them, being confident when asking difficult questions, supporting challenging clients or complex situations. Learn when to talk and when to listen. Tips on asking high quality questions that will help lead clients to the best resources for their individual situations and how to think critically about what we need to know to give the best resources.

*Julie Nurmi, Canadian Mental Health Association, Edmonton Region, Edmonton, Alberta*

### Tuesday, June 4

2:00pm - 3:15pm

A704, Atrium Level

#### **E-7: "Grief and Bereavement: Empowering When Someone is Hurting"**

Loss is something that we, as well as those who come to us, experience. Even though loss is universal, the response to loss is individual. This workshop will take a brief look at the process of grief and bereavement with the goal of empowering us to empower others through a process of healing.

*John Plonski, IMAlive Virtual Crisis Center, Hicksville, New York*

### Wednesday, June 5

9:00am - 10:15am

A704, Atrium Level

#### **E-8: "Improving Client Engagement via Phone-Based Services"**

Discuss different engagement techniques with I&R agencies that provide phone-based services. The session will be very interactive and will require participants to work in groups to gain knowledge. We will begin with reviewing the key principles and then have the participants divide into break out groups to apply the information received, before finishing with a Q&A session.

*Shamonica McGill, Healthy Mothers, Healthy Babies Coalition of Georgia, Atlanta, Georgia*

### Wednesday, June 5

2:15pm - 3:15pm

A708, Atrium Level

#### **E-9: "Service Delivery Open House"**

This final session offers an issue-oriented drop-in to provide time for constructive reflection, collaborative problem-solving and final networking. The workshop will be facilitated and an online space set-up during the conference for people to post "let's talk about" ideas for people who are planning to attend (although anyone can just drop-in). We will also be using it as an opportunity to follow-up with issues emerging from the other sessions on the Service Delivery Track or any unanswered questions still remaining.

*Chiara Cameron-Wood, AIRS, Pleasant Grove, Utah*



## Workshops by Track and Description continued

### I&R MANAGEMENT TRACK

The sessions on this track are geared towards issues distinct to I&R Management. However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to I&R management issues. Remember, anyone can attend any session and that everything in I&R is connected.

#### Monday, June 3

10:00am - 11:15am

A706, Atrium Level

##### F-1: "Operation Overnight: The Goal of Being 24/7"

What do you think of when you hear about working the overnight shift? This presentation should make that concept a bit more enjoyable compared to what you initially thought! This session will discuss fun/creative approaches to providing I&R coverage 24/7. Despite facing challenges to the overnight, there are always options. This is a must for centers wanting to be 24/7 or for existing 24/7 centers that need to push forward.

*Richard Shutes, Jewish Community Services of South Florida, North Miami, Florida; Matthew Walton, Jewish Community Services of South Florida, North Miami, Florida*

#### Monday, June 3

1:00pm - 2:15pm

A706, Atrium Level

##### F-2: "Strategic Partnerships: How to Bring Macro-Level Thought to Micro-Level Application"

In today's fast-paced integrated health and social services world, it is critical for crisis and social service contact centers to build meaningful relationships with stakeholders across a broad chasm of specializations and demands. This workshop puts the contact center at the middle of a vast network of services and resources as the connection point between disparate systems. By incorporating four key principles into your operation, you will hold the foundational building blocks for strategic partnerships.

*Justin Chase, Crisis Response Network/AZ 211, Tempe, Arizona*

#### Monday, June 3

2:45pm - 4:00pm

A706, Atrium Level

##### F-3: "Collaboration Building: Step-by-Step"

Learn how to collaborate through role-playing. This session is an adventure where you join a fictional agency, take on a persona and role and help (or don't) define how your agency will collaborate and partner with others. Interactions include group discussion, allowing you to get creative to identify goals, risks and eventually build a collaboration. We will walk you through recommended "Get Ready Tasks" that will make your next collaboration negotiation more successful. Leave the negotiations with a sample agreement/MOU you can use in your real-world partner building

adventures.

*Polly McDaniel, iCarol, Canisteo, New York; Crystal McEachern, iCarol, Edmonton, Alberta*

#### Tuesday, June 4

8:45am - 10:00am

A706, Atrium Level

##### F-4xWinning Grants: How to Turn No Into Yes"

Learn how to uncover what opportunities are worth your time, build relationships with funders, get them to ask you for a proposal, match your needs with their agenda, and why a "no" is really the first step to "yes." We will also cover efficient online research tools, and when not to use them. The presenter has many years' experience as a grants officer awarding grants, and as an applicant successfully acquiring millions of dollars in funding. Some initial experience with grant writing and grant applications is useful, but not required.

*Dr. W. Douglas Zimmerman, Visionlink, Boulder, Colorado*

#### Tuesday, June 4

10:30am - 11:45am

A706, Atrium Level

##### F-5: "Connect the Unconnected through Community Information Exchanges"

With a growing movement towards "person-centered services" and interconnectivity with health and social service programs, it is essential that communities establish Community Information Exchanges to allow organizations to care coordinate with each other and their clients to improve their health outcomes, improve organizational and system efficiencies and lower costs of delivery. This session will highlight work being done in San Diego and beyond to implement and sustain such exchanges.

*Megan Storer, 211 San Diego and Community Information Exchange of San Diego, San Diego, California*



## Workshops by Track and Description continued

### Tuesday, June 4

10:30am - 11:45am

A705, Atrium Level

#### F-6: "AIRS Accreditation: What's New?"

This workshop is for those considering applying, currently in the process or for those that will be renewing their Accreditation in the next year. Join us to learn about the new "secret shopper" component, hear about our new national partner and meet the new Accreditation Manager. There will be an opportunity to ask questions and to share helpful tips.

*Jennie Pollak, Michigan 211, Lansing, Michigan; Linda Daily, AIRS, Oak Island, North Carolina*

### Tuesday, June 4

2:00pm - 3:15pm

A707, Atrium Level

#### F-7: "Creating an Online Training Program for Community Resource Specialists: A Test Case"

After much vacillating, we took the plunge and put our I&R training online for public consumption. This workshop addresses the challenges, benefits and lessons learned. Participants will have the opportunity to go through this interactive and facilitated course. The course consists of 4 modules (Introduction to Information & Referral; Assessment Skills; Navigation Skills; Advocacy, Follow-up and Crisis Intervention) and incorporates several learning styles. Feedback appreciated.

*Faed Hendry, Findhelp Information Services, Toronto, Ontario*

### Wednesday, June 5

10:30am - 11:45am

A706, Atrium Level

#### F-8: "Developing Partnerships and Building Your Volunteer Base"

This interactive session will cover the benefits of partnerships, how to develop and sustain partnerships and overcoming barriers. The participants will create a partnership mosaic to identify potential partnerships from their communities. There will be an open discussion forum to discuss the six stages of the volunteer management cycle and the value of knowing your volunteer's motivation, generation and learning style.

*Shannon Jones, Tennessee Commission on Aging and Disability, Nashville, Tennessee; Sidney Schuttrow, Tennessee Commission on Aging and Disability, Nashville, Tennessee*

### Wednesday, June 5

2:15pm - 3:15pm

A705, Atrium Level

#### F-9: "I&R Management Open House"

This final session serves as an issue-oriented drop-in to provide time for final networking and to try and find answers to any yet-unanswered questions. The workshop will be facilitated, and an online space will be set-up during the conference for people to post "let's talk about" ideas if they are planning to attend. If there are any topics that you still have questions on, this is a time when

you can get those questions answered.

*Clive Jones, AIRS Executive Director, Victoria, British Columbia*

## RESOURCE DATABASE TRACK

The sessions on this track are geared towards issues distinct to I&R Resource Databases. However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to I&R resource database issues. Remember, anyone can attend any session and that everything in I&R is connected.

### Monday, June 3

10:00am - 11:15am

A707, Atrium Level

#### G-1: "Wrangling the Pumpkin Patch: Translating Taxonomy in I&R Training"

Taxonomy is like a foreign language, but once mastered, it's a pivotal tool for pinpointing relevant referrals amongst the thousands of records in a resource database. This session will provide a framework for introducing Taxonomy clearly and memorably to new staff, "translating," so it's easier to understand. We'll discuss strategies to encourage trust and reliance on Taxonomy searching long after training ends. This session is for I&R managers or anyone who plays a role in training staff on Taxonomy use.

*Patricia Skagen-Emokpae, Canadian Mental Health Association, Edmonton Region, Edmonton, Alberta, Canada*



### Monday, June 3

1:00pm - 2:15pm

A707, Atrium Level

#### G-2: "From Atlanta with Love: How We Keep our Resource Database Relevant and Awesome"

Sometimes old school is the way to go. This workshop is for resource staff that are asked to create printed directories but are on the fence in their usefulness. Social media can be a monster, but we will also show you how to tame it and use it to your advantage. We will share an innovative way to make our service available to the community and in an affordable manner.

*Hector Vargas, United Way of Greater Atlanta 211, Atlanta, Georgia;*  
*Shannon Norris, United Way of Greater Atlanta 211 Atlanta, Georgia;*  
*Nhora Plehn, United Way of Greater Atlanta 211 Atlanta, Georgia*

### Monday, June 3

2:45pm - 4:00pm

A707, Atrium Level

#### G-3: 'Oh, the Places Your Resource Data Could Go!'

This session will allow participants to gain an understanding of what resource data sharing means, the different opportunities it entails, and how to start considering if their organization could take on this task. This topic will be presented from both the resource maintenance and technical perspectives and the material would be relevant for Database Curators and IT/Technology staff. Examples of our agency's data sharing projects will be presented and explained to empower participants to generate their own plans on how to share resource data.

*Kate Quigley, United Way of Connecticut 211, Rocky Hill, Connecticut;*  
*Scott Robidoux, United Way of Connecticut, Rocky Hill, Connecticut*

### Tuesday, June 4

8:45am - 10:00am

A707, Atrium Level

#### G-4: "Taxonomy 101" Part One

Using the 211 LA County Taxonomy of Human Services to index or search for services can seem overwhelming. We're here to show you the basics of using the Taxonomy effectively so your resource database will help connect people to the services they need.

*Steve Eastwood, 211 Arizona, Tempe, Arizona; Lindsay Paulsen, United Way of the Midlands, Omaha, Nebraska*

### Tuesday, June 4

10:30am - 11:45am

A707, Atrium Level

#### G-5: "Taxonomy 102" Part Two

Using the 211 LA County Taxonomy of Human Services to index or search for services can seem overwhelming. We're here to show you the basics of using the Taxonomy effectively so your resource database will help connect people to the services they need.

*Steve Eastwood, 211 Arizona, Tempe, Arizona; Lindsay Paulsen, United Way of the Midlands, Omaha, Nebraska*

### Wednesday, June 5

9:00am - 10:15am

A707, Atrium Level

#### G-6: "Build the Foundations of a Peach-tacular Resource Database" Part One

Presenters will discuss the building blocks that are the foundation of all peachy resource databases. The session will begin by defining who your community resource database will serve. They will then touch on the 5 policies and procedures used as the blueprint to guide the work of curating a resource database. Special attention will be placed on your inclusion/exclusion policy and a resource element data map/matrix to document and direct your decisions for the future. Appropriate for all resource staff and their managers.

*Laura Smith, Ontario 211 Services, Toronto, Ontario; Polly McDaniel, iCarol, Canisteo, New York; Crystal McEachern, iCarol, Edmonton, Alberta*

### Wednesday, June 5

10:30am - 11:45am

A707, Atrium Level

#### G-7 "Build the Foundations of a Peach-tacular Resource Database" Part Two

Now that you have a peachy resource database, take the next steps to ensure it is forever Peach-tacular. This second session focuses on resource database maintenance. Learn from experienced presenters what to consider when prioritizing records to be updated, how to create a formal and informal update process, and document your workflows. Make data driven decisions with the use of statistics to weed your records, make informed policy decisions and complete annual review of your inclusion/exclusion policy. Appropriate for all resource staff and their managers.

*Laura Smith, Ontario 211 Services, Toronto, Ontario; Polly McDaniel, iCarol, Canisteo, New York; Crystal McEachern, iCarol, Edmonton, Alberta*

### Wednesday, June 5

2:15pm - 3:15pm

A703, Atrium Level

#### G-8: "Resource Database Open House"

This final session offers an issue-oriented drop-in to provide time for constructive reflection, collaborative problem-solving, and final networking. The workshop will be facilitated and an online space set-up during the conference for people to post "let's talk about" ideas if they are planning to attend. We will also be using it as an opportunity to follow-up with issues emerging from the other sessions on the Resource Database Track or any unanswered questions still remaining.

*Steve Eastwood, 211 Arizona, Tempe, Arizona*



### DATA AND TECHNOLOGY TRACK

The sessions on this track are geared towards issues distinct to data and technology issues relevant to I&R. However, there are sessions here of interest to people working in other areas of I&R, plus there are sessions in other tracks relevant to I&R technology issues. Remember, anyone can attend any session and that everything in I&R is connected.

#### Monday, June 3

10:00am - 11:15am

A703, Atrium Level

##### H-1: "Open Sesame: Three Models for Resource Data Sustainability through Open Systems"

Resource data is public information, yet it takes time and energy to maintain. This presents a paradox: how can resource data be both sustainable and "open" (accessible to everyone, through any channel)? This session will offer three hypothetical answers, each being tested through real-world experiments with prospective new business models. We will also consider some still-unanswered questions about how I&R providers can responsibly step into the open.

*Greg Bloom, Open Referral, Miami Beach, Florida*

#### Monday, June 3

1:00pm - 2:15pm

A703, Atrium Level

##### H-2: "Crash Course on Data Exchange and Data Standards"

In a world where data exchange defines the value of your data, spend 75 minutes in this crash course on data exchange and data standards. We'll cover the difference between bulk and incremental exchanges (APIs vs CSV), how to structure your data for use by other partners and contracts, how to clean and normalize data in your day-to-day work so that data exchange is not difficult, and the ins and outs of the Human Services/Open Referral Data Standard, HIPPA data impacts, and confidentiality considerations. The session will focus on the tips, tricks and traps for Data Exchange and Normalization, hard won lessons that will make your work easier, regardless of the system or software you use. Designed for those who need to do the work or supervise the work of data management and exchange.

*Dr. W. Douglas Zimmerman, Visionlink, Boulder, Colorado*

#### Tuesday, June 4

8:45am - 10:00am

A703, Atrium Level

##### H-3: "I&R and the New Data Economy"

Non-Governmental Organizations (NGOs) across the spectrum are trying to catch up with the new data economy in a digital

age. How do you make your case for relevance? Can you work with your community to provide useful needs analysis? Funding entities want measurable results and they want you to "show your work", and data is the currency of the 21st century.

*Russ Jensen, Knoxville's Center for Service Innovation (CSI) 311/211, Knoxville, Tennessee*

#### Tuesday, June 4

10:30am - 11:45am

A703, Atrium Level

##### H-4: "How Data Biases are Affecting Your Decisions: Common Decision-Making Pitfalls"

How do you analyze reports and make decisions on where to focus your efforts? How do you learn to identify data points to achieve the best understanding of what the data is reporting? What are some of the common (and many times unconscious) biases that arise when looking at data reports? What are some strategies to overcome these biases? These questions and more will be answered in this presentation.

*Scott Robidoux, United Way of Connecticut, Rocky Hill, Connecticut*

#### Wednesday, June 5

9:00am - 10:15am

A703, Atrium Level

##### H-5: "The What's, How's, and Why's of Interoperability: Busting Resource Database Silos and Building Resourceful Ecosystems"

"Interoperability" is the capacity for different systems to work together. This workshop will consider how interoperability happens and what it makes possible for the I&R sector. We will focus primarily on the prospect of resource directory interoperability, so that the same data can be accessed in real-time by different technologies, in the context of the Human Service Data Specification and API protocols, which were formally endorsed by AIRS in 2018. We will also consider the opportunities and risks of interoperability for information about people.

*Greg Bloom, Open Referral, Miami Beach Florida*

#### Wednesday, June 5

10:30am - 11:45am

A703, Atrium Level

##### H-6: "Salesforce: A Platform for I&R Innovation"

Are you an I&R professional interested in leveraging the best technology to drive your mission? Learn about the many applications of the Salesforce CRM platform. See how other I&R organizations use Salesforce to manage their resource database, ensure consistent service delivery, evaluate program metrics, and share resources with partner organizations, all while meeting AIRS Standards. Join us for a fun, interactive session and put the power of the cloud to work for your organization!

*Pierre Kaluzny, Sputnik Moment, Phoenix, Arizona; Aimee Heintz, Sputnik Moment, Phoenix, Arizona*

## Workshops by Track and Description continued

### FOR EVERYONE TRACK

The sessions on this track are geared towards issues that have some relevance to all I&R providers. Remember, anyone can attend any session and that everything in I&R is connected.

#### Monday, June 3

10:00am - 11:15am

A705, Atrium Level

##### J-1: "Introduction to Funding Programs: Grant Proposals and Sustainability"

An introductory workshop to provide a foundational understanding of the components necessary to achieve success with a funding proposal. This workshop is appropriate for persons new to the topic, as well as a refresher for those with some experience in proposal development for funding. It is also appropriate for those with an interest in administrative aspects of agency functioning, as well as those whose interest continues to be direct service but would like to understand how it all works.

*Edward D'Angelo, The Information Center, Taylor, Michigan*

#### Monday, June 3

1:00pm - 1:15pm

A705, Atrium Level

##### J-2: "Off Site and Without Sight"

This highly informative open platformed workshop will showcase experienced professionals with extensive knowledge in the fields of remote employment, telecommuting, assistive technology in the workplace, and employing the blind or visually impaired and maintaining 24/7 coverage. Discussions on the benefits of and how to overcome obstacles with a remote workforce as well as the employment of blind staff. Inquiring minds want to know, and we would love to discuss how we successfully staffing center.

*Dawn Vanderkooi, 211WNY, a program of The Olmsted Center for Sight, Buffalo, New York; Derrick Haudricourt, 211WNY, a program of The Olmsted Center for Sight, Buffalo, New York*

#### Monday, June 3

2:45pm - 4:00pm

A705, Atrium Level

##### J-3: "The Ins and Outs of Social Determinants of Health"

We have learned that an individual's social needs can impact their physical health needs. If you can't afford your electric bill, you probably aren't able to go to the dentist or pay that co-pay at the doctor's office. But now that we understand the correlation, what can we do about it? Hear what different agencies are doing to help their clients with Social Determinants of Health Needs, how they are screening for those needs, and how they are working with local agencies and health care providers.

*Melissa Ladd Patnode, Central Michigan 211/United Way of Jackson County/LifeWays Community Mental Health, Jackson, Michigan; Mike Lightbody, Center for Disabilities and Development (CDD) at University*

*of Iowa Healthcare, Iowa; Karen Milligan, Ontario 211 Services; Pamela Hillier, Community Connection, Collingwood, Ontario*

#### Tuesday, June 4

8:45am - 10:00am

A705, Atrium Level

##### J-4: "Talking 'Bout Your Generation: Intergenerational Volunteer Management"

This session will be an open discussion forum to help develop resources and strategies to get to know the motivations of the four main generations in the volunteer workforce. We will conduct a small group activity to learn the defining moment, strengths, weaknesses and stereotypes of each generation. Attendees will be given an assessment to help them realize their motivation when it comes to volunteer and possibly use this tool to gain a better understanding of their volunteers' motivations.

*Sidney Schuttrow, Tennessee Commission on Aging and Disability, Nashville, Tennessee*

#### Tuesday, June 4

2:00pm - 3:15pm

A703, Atrium Level

##### J-5: "Building an Effective Closed-Loop Referral Network to Address Social Determinants"

Healthcare providers and community agencies are looking to I&R programs to work with them to assess clients' social determinant needs, identify resources to address them, then work together to track referrals and client outcomes. Learn from case studies and research to identify partnership opportunities, strategies for building an effective partnership, and defining your organization's role and expectations as an I&R partner in a community care network. This workshop is designed for senior managers and directors involved in program design and development.

*Dr. Michael Klinkman, Great Lakes Research into Practice Network, Ann Arbor, Michigan; Melissa Ladd-Patnode, Central Michigan 211, Jackson, Michigan; Bob Fike, CEO, RiverStar Software, Wheaton, Illinois*

#### Tuesday, June 4

2:00pm - 3:15pm

A708, Atrium Level

##### J-6: "What To Do Now To Be Ready for HIPAA Compliance"

This session is designed for 211, I&R, volunteer and disaster relief centers preparing to become HIPAA compliant in the future. We will focus on the core requirements of the HIPAA regulations, what it means when your center is not a covered entity, when you will need to comply, and what you can do now — in policy and practice to better prepare you and your organization. The objective is to take some steps now to lessen the impact when a future opportunity requires HIPAA compliance. Our focus will be on policy, practice, and procedures for your organization to consider, not the technical system components of HIPAA compliance.

*Dr. W. Douglas Zimmerman, Visionlink, Boulder, Colorado*

### Wednesday, June 5

9:00am - 10:15am

A705, Atrium Level

#### J-7: "The New Emergency, Treat and Transport (ET3) Model: How I&Rs can Support Community Navigation Across the Transportation Continuum"

By understanding the transportation continuum, organizations can assist their communities in developing an effective and efficient system that allows for affordable, accessible, appropriate, and reliable mobility options. Individuals can then be guided to those options based on their geographical location, program/coverage eligibility, preference, ability to pay, disabilities, medical needs, and service availability. I&R organizations can support the ET3 model through transportation resource directories and system navigation to assist 911 dispatches and ambulance transport alternatives for non-emergency medical and non-medical needs.

*Teresa Gerard, Guardian Group, LLC, Greater Kansas City Area, Kansas City, Missouri*

### Wednesday, June 5

10:30am - 11:45am

A701, Atrium Level

#### J-8: "Bringing Health Literacy Compliance to I&R Services"

Iowa Compass, provider of disability-related I&R services for the state of Iowa, recently set out to ensure our audience can read, understand and use the often-complex information we share. Iowa Compass developed a plan to learn about health literacy standards, and find the right tools to bring our resources and materials into compliance with those standards. Learn best practices for health literacy compliance and tools to meet the standards.

*Meredith Field, Iowa Compass, Iowa City, Iowa*

### Wednesday, June 5

10:30am - 11:45am

A704, Atrium Level

#### J-9: "Mental Health as an Ability"

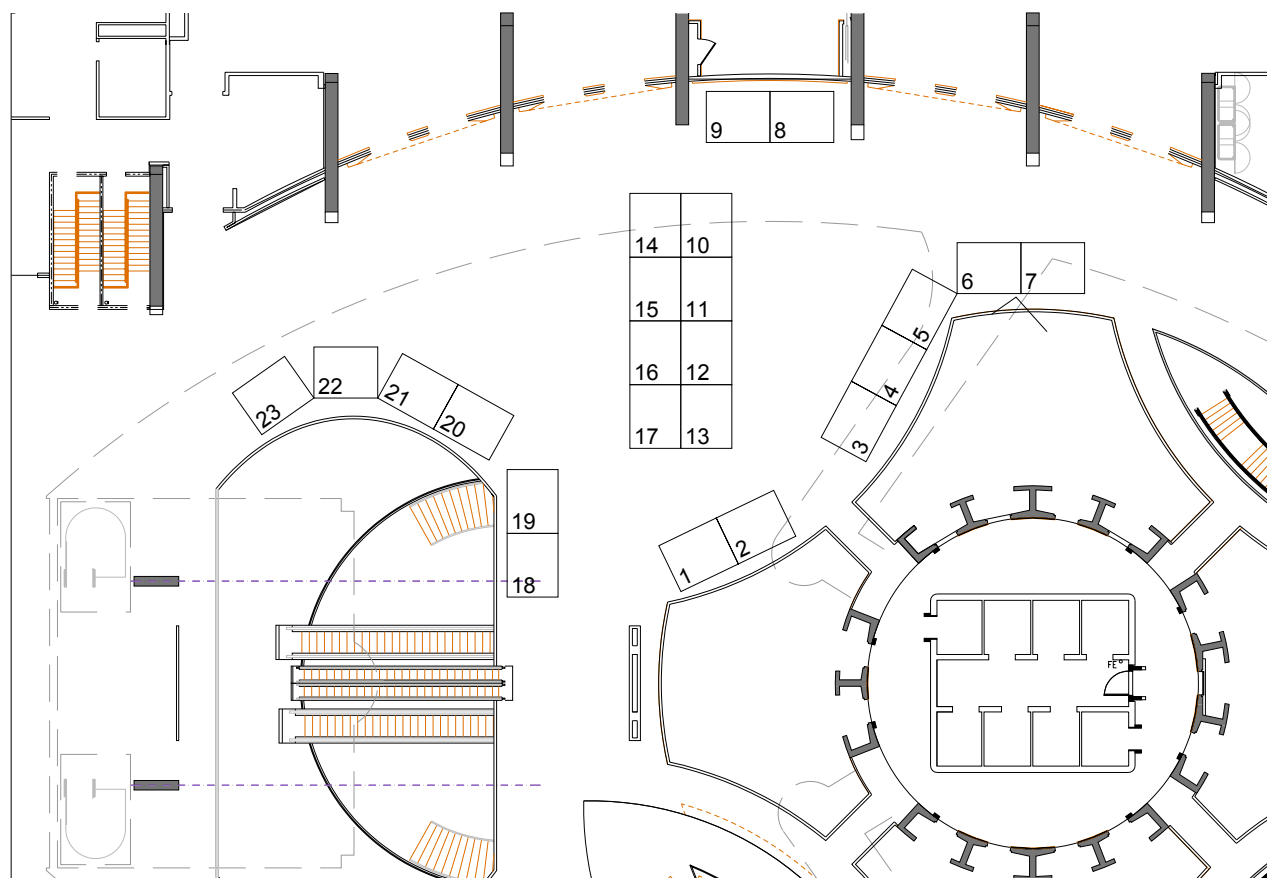
As we do our work, the topic of mental health comes up. The intent of this workshop is to help attendees work past the myth, stigma and attitudes surrounding mental illness and empower workers to assist consumers with something more than a simple referral to therapy or counseling.

*John Plonski, IMAlive Virtual Crisis Center, Hicksville, New York*





# Exhibitor Hall Floor Plan



Booth Number	Exhibitor Name
1	WellSky
2	Social Security Administration
3	RTM Designs
4	RTM Designs
5	RTM Designs
6	AIRS
7	FRIENDS OF AIRS
10	Commtrol
11	National Association of Area Agencies on Aging/Eldercare Locator
12	211 Counts
13	iCarol
14	Michigan AIRS
15	Telelanguage
16	Language Line Solutions
17	iCarol
18	GAIRS
19	RiverStar
20	Visionlink
21	Agis Network, Inc.
22	CONTACT USA

Exhibitor Name	Booth Number
Agis Network, Inc.	21
AIRS	6
Commtrol	10
CONTACT USA	22
FRIENDS OF AIRS	7
GAIRS	18
iCarol	13
iCarol	17
Language Line Solutions	16
Michigan AIRS	14
National Association of Area Agencies on Aging/Eldercare Locator	11
RiverStar	19
RTM Designs	3
RTM Designs	4
RTM Designs	5
Social Security Administration	2
Telelanguage	15
211 Counts	12
Visionlink	20
WellSky	1

# Exhibitor Descriptions & Contact Information

## **AGIS Network, Inc.**

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[www.agisnetwork.com](http://www.agisnetwork.com)

**Al Schreitmüller**, Director, Agency Services  
[al@agisnetwork.com](mailto:al@agisnetwork.com)

AGIS Network is a leading provider of AIRS format provider database extenders. We provide interoperability between databases, search/indexing/updates service and Professional quality Directory print (.pdf) modules as well as consumer facing tools all of which take on the look and feel of their parent websites. We also facilitate agency on-line branding and can develop a fresh look and feel.

## **Commctrl**

**3446 Old Green Rd  
Suite #301  
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216.245.1500 or 833.BEST211**

[www.Commctrl.com/best211](http://www.Commctrl.com/best211)

**Bob Glassman**, President  
[rglassman@commctrl.com](mailto:rglassman@commctrl.com)

Commctrl uniquely specializes in performing work with the 211 telecom carriers that has proven to produce significant cost savings for 211 agencies in an area largely unknown to date. We eliminate a great majority of toll free costs through new mobile carrier actions. Our expertise is also reducing costs related to traditional landline and VoIP initiated calls. We are also working on behalf of all 211 contact centers by addressing emerging, important costs, such as cloud voice (like Google Voice), new significant carriers such as Spectrum and Xfinity Mobile, and 5G mobile. No other company services 211 contact centers in this manner. Commctrl provides 211 agencies new and significant cost savings!

## **CONTACT USA**

**6339 Charlotte Pike  
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[www.contact-usa.org](http://www.contact-usa.org)

**Gail Selander**, Executive Director  
[gselander@contact-usa.org](mailto:gselander@contact-usa.org)

CONTACT USA (CUSA) is a national membership organization whose mission is to provide accreditation, leadership, support and networking opportunities to organizations who offer helpline services to people in crisis via phone, and online emotional support services including chat and texting. We arrange training and consultation for the delivery of crisis services through the outlined best practices of accreditation. Since 1967, CUSA has been helping crisis centers of all sizes work to support their local communities. CONTACT USA strives to promote excellence in crisis services

## **iCarol**

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iCarol is a technology solution designed especially to meet the contact documentation and resource management needs for 211s, ADRC/AAAs, crisis intervention centers, victims services, addiction hotlines, and other I&R services. With iCarol, you can grow and improve your service delivery and prove your community impact. iCarol helps you respond to changing community needs, and offers collaborative features and software integrations to help you impact more lives. Functionality includes forms for logging contacts, follow-up, dispatching Mobile Crisis Response, robust resource database management tools, volunteer and staff management, live chat and texting, reporting, and more. iCarol is proud to support over 80,000 users worldwide, including over 45% of 211 providers in the US and 100% of Canada.

## **LanguageLine Solutions**

**One Lower Ragsdale Drive, Bldg. 2  
Monterey, California 93940  
831.648.5534**

[www.languageline.com](http://www.languageline.com)

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LanguageLine Solutions® enables AIRS members and supporters to communicate in more than 240 languages, 24/7/365. Trusted by more than 28,000 clients, we're the global leader in innovative language access solutions for omni-channel contact centers, offering high-quality, secure, phone and video interpreting, testing and training programs for bilingual staff, and translation and localization services. We enable communication in any situation and support over 36M interpretation requests annually, providing clients scalable language solutions that help them to connect diverse communities with the services they need.

## **National Association of Area Agencies on Aging/Eldercare Locator**

**1150 New Jersey Avenue, SE  
Suite 350  
Washington, DC 20003  
202.872.0888, Eldercare Locator: 800. 677.1116**

[www.n4a.org](http://www.n4a.org); [www.eldercare.acl.gov](http://www.eldercare.acl.gov)

**Patrice Earnest**, Director, Eldercare Locator  
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The Eldercare Locator is funded by the U.S. Administration on Aging which is a part of the Administration for Community Living and is administered by the National Association of Area Agencies on Aging. Through its National Call Center, 800.677.1116 which operates five days a week from 9:00 a.m. to 8:00 p.m. ET, and website [www.eldercare.acl.gov](http://www.eldercare.acl.gov), the

Locator serves as a trusted gateway for older adults, people with disabilities and their caregivers searching for information and resources that can be crucial to their well-being and independence.

### **RiverStar**

**20 Danada Square West**

**Suite 260**

**Wheaton, Illinois 60189**

**800.945.6399**

[www.riverstar.com](http://www.riverstar.com)

**Bob Fike, CEO**

[rfike@riverstar.com](mailto:rfike@riverstar.com)

RiverStar empowers United Way and 211 agencies with software solutions to automate and streamline your day-to-day operations, develop sustainable revenue models and improve health and economic outcomes. We develop applications for: Coordinated Care Screenings and Resource Referrals for social determinants of health

- Appointment and Resource Scheduling (tax preparation, shelter beds, food pantry visits and others)
- Program Enrollment (utility assistance, broadband enrollment, healthcare enrollment, etc.)
- Reporting to gain operational insight and meet grantor, state and federal requirements

RiverStar solutions can be customized or built to meet the unique needs of your agency and can be accessed via desktop or mobile devices.

### **RTM Designs**

**229 Airport Road**

**Suite 7-141**

**Arden, North Carolina 28704**

**888.933.5052**

[www.rtmdesigns.com](http://www.rtmdesigns.com)

**Jerome Tate**

[Jerome@rtmdesigns.com](mailto:Jerome@rtmdesigns.com)

RTM Designs welcomes you to our 2019 AIRS Conference exhibit area tables 3, 4, and 5. Stop by and visit us to learn about sharing 211 data nationally. We will be demonstrating Navigate and Curate - our latest cloud software. Let us show you our fully implemented National Text Platform service integration with automated follow-up survey texts. Lots to see this year!!

### **Social Security Administration**

**6401 Security Blvd**

**Annex 3424**

**Baltimore, Maryland 21235**

**410.966.8646**

[www.socialsecurity.gov](http://www.socialsecurity.gov)

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The Social Security Administration provides partial replacement of earnings lost due to the retirement, death, or disability of a worker. Payments are based on how much the worker earned during his or her working career. You can find specific information about these programs by visiting [www.socialsecurity.gov](http://www.socialsecurity.gov).

### **Telelanguage, Inc.**

**514 SW 6th Avenue**

**4th Floor**

**Portland, Oregon 97204**

**888.983.5352, 503.459.5890**

[www.Telanguage.com](http://www.Telanguage.com)

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Telelanguage provides video and telephonic interpretation in over 300 languages 24/7/365. Connect in seconds! Stop by booth 15 to receive preferred rates or view our information in the new member toolkit.





### 2-1-1 Counts

5899 Nina Place

St. Louis, Missouri 63112

314.620.9351

[www.211counts.org](http://www.211counts.org)

**Erika Halsey**, Director of Operations

[ehalsey@hcimpact.com](mailto:ehalsey@hcimpact.com)

Developed by Washington University in St. Louis and Health Communication Impact LLC, 2-1-1 Counts is the first web-based tool to provide real-time, searchable, and visual displays of data from 2-1-1 call centers across the nation. The 2-1-1 Counts dashboard shows the most pressing needs, day-by-day, in the communities served by 2-1-1s. Calls to Action is a new product using 2-1-1 Counts data to provide in-depth analyses and recommendations to help health care entities, school districts, and foundations determine how to address social determinants of health in their communities or catchment areas.

### Visionlink, Inc.

3101 Iris Avenue

Suite 240

Boulder, Colorado 80301

303.402.0170

[www.visionlink.org](http://www.visionlink.org)

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Visionlink now offers a complete suite of 211, I&R, Aging & Disability, Veterans Assistance, Disaster Relief, Case

Management, Donation, Volunteer, and Social Determinants modules all on one platform. The most comprehensive and advanced solution. Mobile responsive, AIRS, HIPAA, PCI, FERPA, PII and HSDS compliant. Integrated telephony, chat, text, and email. True Area Served solutions and powerful Resource Update Dashboards for every agency. With Visionlink's API Builder to build or match other APIs for a network of data exchanges. Ready to ensure your future? Let's connect: [solutions@visionlink.org](mailto:solutions@visionlink.org).

### WellSky

11711 W 79<sup>th</sup> Street

Lenexa, Kansas 66214

913.307.1000

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WellSky delivers software and services to transform an ever-growing range of care services worldwide. We anticipate the needs of care providers and communities, empowering them with insights and solutions, so both businesses and communities flourish. Building on a history of excellence and a reputation for quality, WellSky, formerly Mediware Information Systems and Kinnser Software, enables providers to deliver exceptional care, improve operational efficiency, reduce cost, and meet the challenges of their rapidly changing industries.



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## Conference Presenters continued

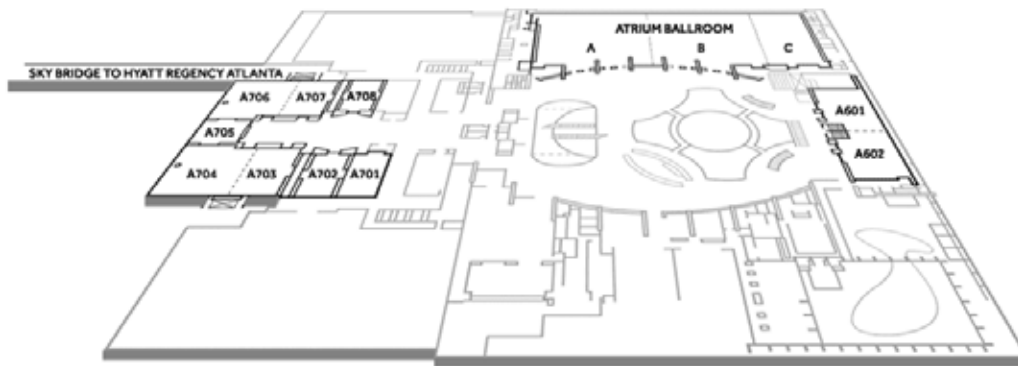
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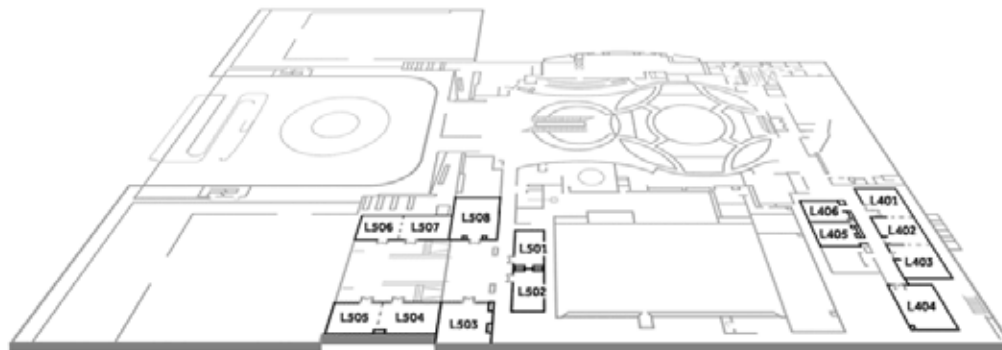
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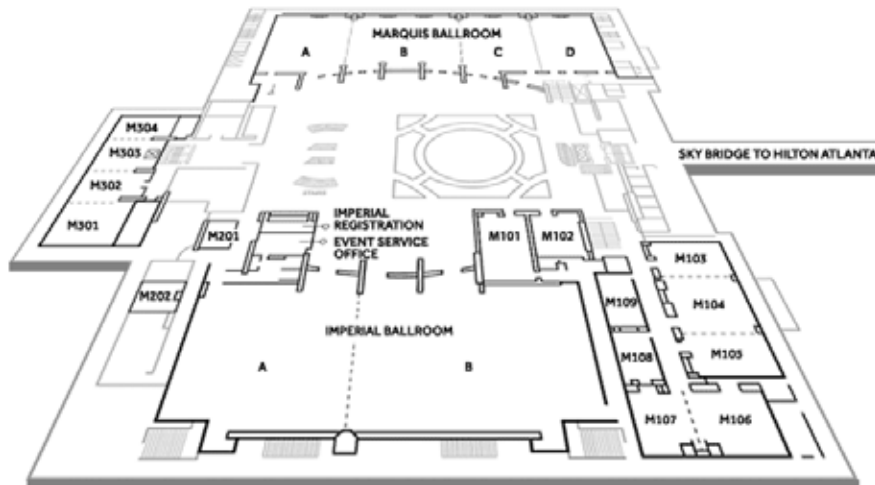
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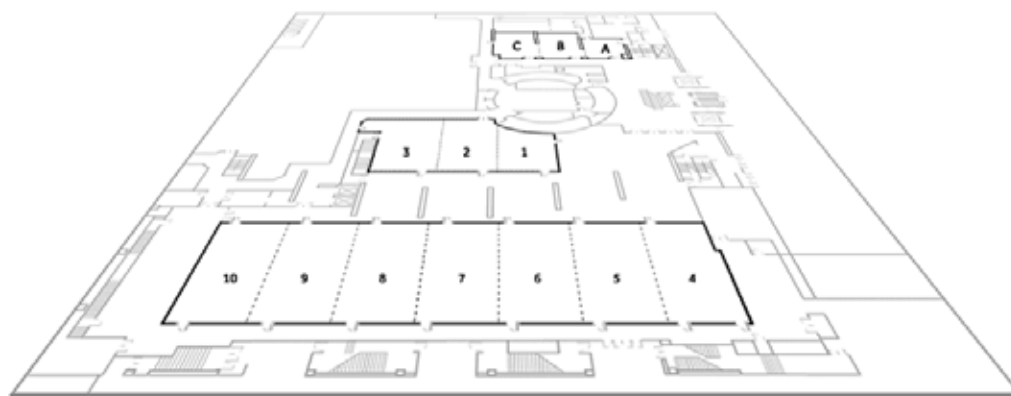
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