



## **2025 SUN, SURF & SESSIONS: RIDE THE WAVES OF CHANGE**

SESSION GUIDE | Click to navigate to the session description.

### **GENERAL SESSIONS**

- [211HSIS Taxonomy 101: Super Skills Academy](#)
- [A Fresh Look: Key Updates to the Accreditation Manual](#)
- [An Innovative Approach to Disaster Response & Recovery for 211 and VOAD](#)
- [An Overview of 988 and Collaborative Possibilities](#)
- [Assisting I&A Professionals to Identify and Empower Neurodivergent Individuals](#)
- [Beyond Dashboards: Building a Statewide 211 Business Intelligence Platform](#)
- [Beyond the Script: A Deeper Dive into Trauma-Informed QA](#)
- [Building Bridges: Enhancing Quality Through Collaborative QA Practices](#)
- [CA vs Hate Network of CA 211 Providers Cast a Real Safety Net for Victims of Hate](#)
- [Centering Community Voice to Better Service Delivery](#)
- [Collecting Demographics: Tips on How and Why We Do It](#)

- [Creating a Robust Keyword System for a Specialized I&R](#)
- [Expanding Public Benefit Access Through 2-1-1: 2-1-1 Colorado and MyFriendBen](#)
- [Fighting Resource Inequity for Latinos with the National Paralysis Resource Center](#)
- [Food Insecurity Research Using 211 Data](#)
- [From Good to Great: Lessons Learned from Revamping our Training Program](#)
- [From Resources to Economic Independence](#)
- [Guardians of the Taxonomy! Superhero Strategies in Action with the 211HSIS Taxonomy Customization & Targets](#)
- [How to Prepare for an Inform USA Certification](#)
- [Industry guidance on the use of AI from Inform USA's AI Task Force](#)
- [Introducing the Nebraska 211 Military and Family Helpline: Supporting All Military-Connected Individuals and Their Families](#)
- [Let's Move! Strengthening and Healing Your Brain](#)
- [Money Matters: Benefit Programs for Low-Income Medicare Beneficiaries](#)
- [Navigating I&R During Changing Times](#)
- [No, We're Not a Travel Agency: What are AAAs and How Do They Fit in the Information and Referral World](#)
- [Partnering with Utilities to Improve Safety and Resilience for Vulnerable Communities](#)
- [Reimaging Information & Referral in Community Spaces](#)
- [Social Identity Data Collection \(SID\): Data for Equity Challenges and Opportunities in I&R](#)
- [Specialized Services Start-Up Strategies](#)
- [Strategizing Transportation Options for Unpaid Family Caregivers](#)
- [The Power of Outreach and Education to Skyrocket I&R](#)
- [Working with Emotion on I&R Calls](#)

## **SYMPOSIUMS**

[Suicide Intervention and Prevention in I&R](#)

- [Beyond the Storm: I&Rs Role in Suicide Postvention and Community Recovery](#)
- [Military Culture: What it Takes to Ask for Help and How to Find the Solutions](#)
- [Diffusing Difficult Calls and Situations - The Struggle is Real](#)

#### [Symposium #2: 211 Symposium:](#)

- Sessions to be announced in early March

#### [Symposium #3 | Aging and Disability Resources](#)

- Sessions to be announced at a later date

#### [SYMPOSIUM #4 | Military Services](#)

- [Assisting Service Members Reintegration into the Civilian Sector, Post-Military Service](#)
- [The Role of Counties in Supporting Our Reserve Component Service Members, Veterans and Their Families](#)
- [Primary Prevention and Resiliency, Resources Across the DoD](#)

## OPENING KEYNOTE ADDRESS

Bill McKendry- Topic To Be Announced

## CLOSING KEYNOTE ADDRESS

Mark Ostach- Topic To Be Announced

## GENERAL SESSIONS

### **211HSIS Taxonomy 101: Super Skills Academy**

*Jennifer Palmer, Database Coordinator, PA 211 Southwest, and Nichole Bonilla, Editor, 211 LA*

This introductory presentation will target beginner-level users of the 211HSIS taxonomy and those who are not using the tool but are interested in learning more. It

will provide a tour of a taxonomy, explaining how its structure is more than just a collection of keywords and providing essential strategies and practices to "boost" your skills to superhero levels.

## **A Fresh Look: Key Updates to the Accreditation Manual**

*Jennifer Abels, Accreditation Director, Inform USA, Other Members of the Accreditation Commission (to be named)*

Whether you have been through the Accreditation process several times before or are considering it for your organization for the first time, this presentation is for you! This workshop will overview the method used to create a new manual in light of the updated standards and explain some high-level changes. Information about applying for Accreditation will be shared, including the five phases, the timeline, and how the requirements are determined. We will also discuss some common barriers to accreditation and brainstorm solutions! Join your peers in taking a fresh look at Accreditation!

## **An Innovative Approach to Disaster Response & Recovery for 211 and VOAD**

*Kelly Brown, CIO, 211 Ventura County, California/Interface Children & Family Services; Lohanna Almanza, 211 Director; Maria Melo-Bueno, VOA; Laura Krolkowski, VOAD Manager; Diandra Villagomez, 211 Supervisor*

This presentation showcases a groundbreaking approach to disaster response that integrates 211 operations and VOAD coordination under one unified system. Unlike traditional models, where 211 serves solely as a VOAD member organization, our program demonstrates how combining these functions enhances community response and recovery efforts. Attendees will learn about our custom-built disaster resource platform, which enables real-time information sharing between public users and response partners. We'll also demonstrate our rapid-deployment needs assessment system featuring live Power BI analytics, which provides critical insights into affected populations and emerging community needs.

## **An Overview of 988 and Collaborative Possibilities**

*Taylor Funke, Manager - Clinical Standards, Vibrant Emotional Health; Riley Juntti, Coordinator - Clinical Standards, Vibrant Emotional Health; Priya Govindaraj, Coordinator - Clinical Standards, Vibrant Emotional Health*

This presentation provides an overview of the standards and practices the 988 Suicide & Crisis Lifeline implements across the 988 Lifeline network. The need for transparent language and continued emphasis on active engagement and collaboration with individuals in crisis will be explored. Participants will gain an understanding of crisis contact center practices regarding safety assessment and intervention, safety planning, supervisory support and training, and community engagement. This presentation will equip professionals to confidently explain 988 services and their practices, how they can help support individuals in crisis and the benefits of collaborative relationships with 988 Lifeline Network centers.

## **Assisting I&A Professionals to Identify and Empower Neurodivergent Individuals**

*Keri Nopens, Division Director of Senior & Independent Living Services, Rural Resource Community Action*

The theme of this presentation is to assist I&A professionals with identifying and empowering neurodivergent individuals. The presentation will focus on identifying neurodivergence and using tools with neurodivergent to achieve positive outcomes, including literal communication, sensory accommodations, respecting boundaries you may not understand, and combating judgment with education. Research has shown that neurodivergent individuals produce up to 28% higher profit revenues when working and have higher rates of retention, engagement, punctuality, and productivity than neurotypicals, yet are exponentially more unemployed and/or homeless than neurotypicals. Only about 20% of people with Autism are employed.

## **Beyond Dashboards: Building a Statewide 211 Business Intelligence Platform**

*Caleb Goodrum, Business Intelligence Director, 211 Illinois; Edward Perry, Executive Director, 211 Illinois; Chris Baldwin, Accreditation and Reporting Specialist, PATH Crisis Center*

How can you transform disconnected data into a powerful advocacy tool? Join us for a journey of planning, building, and leveraging a statewide business intelligence platform for 211 Illinois. Our interdisciplinary team will share how we combined data from 7 contact centers across 102 counties and three different I&R software providers into a unified platform that enables data-driven partnerships, effective advocacy, and streamlined reporting. Using a case study approach, we will first-hand examine

how vision, collaboration, and modern data tools produced a robust business intelligence platform, now a cornerstone of 211 Illinois's growth and storytelling. During the session, attendees will hear from three key speakers: First, a BI specialist will explain how 211 IL navigated the complexities of multi-center data integration and the keys to "BI Readiness." Next, a contact center analyst will share how the platform saved hundreds of hours in reporting. Finally, the Executive Director will provide insights into data-driven partnerships and advocacy using the Impact Dashboard and other custom data tools.

## **Beyond the Script: A Deeper Dive into Trauma-Informed QA**

*Kellie Merdink, Quality Assurance Manager, 211info; Ciara Doyle, COO, 211info; Frida Foncesca, Bilingual Community Information Center Manager, 211info*

This session is a follow-up to Dialing into Empathy. We will explore a deeper dive into applying TIC principles to QA Delivery. As customer-facing employees, agents often encounter callers who are stressed, frustrated, or even experiencing trauma. Additionally, call center agents themselves may be dealing with burnout, stress, or secondary trauma due to the nature of their work. Applying trauma-informed care (TIC) in Quality Assurance (QA) within call centers involves creating an environment that recognizes and responds to the potential trauma experiences of both employees and customers. We will discuss key strategies to integrate TIC into QA processes. As well as discuss common pitfalls and the value of calibrations in QA

## **Building Bridges: Enhancing Quality Through Collaborative QA Practices**

*Zachary Trammel, Program Manager, Eldercare Locator and DIAL, USAging, Washington, DC; Tom Buckley, Senior Director, Health Information Services, Epilepsy Foundation, Bowie, MD; Mariam Schrage, Sr. Associate Director, Contact Center Operations, Alzheimer's Association, Chicago, IL*

Unlock your organization's potential to provide consistent, high-quality helpline support with quality assurance (QA) strategies by simply collaborating and learning from other organizations. This presentation brings together practical insights from three organizations that used what they have learned from one another about what works and what doesn't work to inform real improvements in their service quality and agent feedback and coaching loop. Our primary goal is to share practical strategies to help increase the satisfaction of constituents and staff to enhance your team's

call quality and build consistency. With a focus on straightforward and actionable steps, we'll dive into techniques for setting clear and fair QA standards, monitoring key performance metrics, and giving constructive feedback to agents.

## **CA vs Hate Network of CA 211 Providers Cast a Real Safety Net for Victims of Hate**

*Yolie Anguiano, Anti-Hate Program Director, 211 LA; Alana Hitchcock, Executive Director, 211 CA; Lauryn Murphy, Technical Project MANAGER, 211 LA*

This presentation will demonstrate a model for providing culturally competent I&R and care coordination services through a network of 211, specialty care providers and its supporting technology architecture. We will describe the CA vs Hate program, explaining hate incidents and crimes and how victims can report acts of hate and receive I&R and care coordination support.

## **Centering Community Voice to Better Service Delivery**

*Zenia Torres, Director of Partner Engagement, 211 San Diego/Community Information Exchange*

Historically, programs and services have been developed top-down. To be truly community-driven, 211/CIE San Diego saw the need to be more inclusive of unrepresented people. These initiatives were developed in response to addressing the community's needs as brought forth by the community. 211/CIE San Diego strives to be led by the community through a community-led governance structure responsive to community needs. 211/CIE intends to tap deeper into the community by implementing a new process through gathering specific feedback from community-based organizations coupled with those with lived experience and creating programs that meet the complex needs of our callers. Join us to learn about 211 San Diego's CIE and how they collaborate with the community and expand, improve, and modify our work based on the voices of those who use the care system. Additionally, learn about the evolution of care coordination and their unique programs to support the clients.

## **Collecting Demographics: Tips on How and Why We Do It**

*Lacey Hanson, CRS-A/D, CRS, I&R and Resource Program Lead, ADRC of Oregon; Carla Lundeen, MSN, RN, CMQ/OE, Director of Great Rivers 211; Jodee Fitzgerald, DHed,*

*MHA, CPHQ, MCHES, Director of Population Health and Value-Based Contracting, Outreach Health*

For many I&R specialists, asking demographic questions is the most uncomfortable part of the job. But in this era of reconciliation and social justice, learning to serve marginalized communities equitably is a top priority for many of our organizations. This presentation will help attendees feel more confident in the demographic process by giving context around the individual and community benefits of collecting demographic data; and providing tools and scripting that can be used immediately with I&R callers/consumers to make everyone feel more comfortable.

## **Creating a Robust Keyword System for a Specialized I&R**

*Michael Santangelo, Resource Manager, NYC 988*

The presentation will focus on developing a keyword system for a specialized I&R service. NYC 988 specializes in mental health I&R, and the taxonomy is a great classification tool. However, sometimes, it can be worthwhile to create a keyword system focused on what your I&R does. We've created many keywords, some of which are not clearly represented in the Taxonomy, such as "Mobile Crisis Team (MCT)." Our keyword system is non-hierarchical, but you can build a hierarchical one. In doing so, you can enforce many of the same rules in taxonomy in your keyword system, such as no double indexing.

## **Expanding Public Benefit Access Through 2-1-1: 2-1-1 Colorado and MyFriendBen**

*Kasey Harlos, Senior Director, 211 and Disaster Response, 2-1-1 Colorado; Elise Henson, Executive Director, MyFriendBen*

2-1-1 Colorado & MyFriendBen have paired up to pilot at scale a tool to make the safety net as easy as having a trusted friend by your side. MyFriendBen is an open-source, comprehensive benefit screener that is fast, free, anonymous, and takes under 6 minutes. When used within the 2-1-1 workflow, Colorado has seen promising results for statewide benefit access and increased effectiveness for front-line I&R staff.



## **Fighting Resource Inequity for Latinos with the National Paralysis Resource Center**

*Patricia Correa, Manager, Information Services and Translation, Christopher & Dana Reeve Foundation*

Trustworthy and approachable paralysis resources and information are often unavailable to Latino communities. Following an injury or diagnosis, patients and their families struggle to find the necessary support and education. The Christopher and Dana Reeve Foundation's National Paralysis Resource Center (NPRC) aims to bridge health literacy and be the top resource for the Limited Language Proficiency (LEP) communities. The NPRC started a campaign to promote the visibility of the Latino community in 2017 and saw a significant increase in material requested. In addition, the NPRC added several new features, such as a new interactive Spanish webpage, subtitling on all its educational videos, and dedicated Spanish-speaking bloggers. Resource Specialists working with clients with paralysis can rely on the NPRC for patient education and resources that address language and cultural barriers. These include patient and professional materials in Spanish, free training, collaborative opportunities, and funding from the Foundation.

## **Food Insecurity Research Using 211 Data**

*Nasser Sharareh, Research Assistant Professor, University of Utah; Maiyer Lor, Director of Client Care, Utah's Promise*

Many people experiencing food insecurity do not know where to get help or face barriers to accessing nutrition assistance programs. They may seek information from various sources, including social service providers, to find assistance for food. One of the major social service providers is the 2-1-1 network—a non-profit, free referral system and the nation's most comprehensive source of information about local resources. In collaboration with the United Way of Salt Lake, the operator of 2-1-1 in Utah, we explored the usability of 2-1-1 food-related calls to inform timely food insecurity interventions such as optimizing resource allocations to food pantries or connecting people to other resources such as SNAP.

## **From Good to Great: Lessons Learned from Revamping our Training Program**

*Zachary Adams, Training and Outreach Manager, United Way of Connecticut;  
Cheyenne Tillman, Training Coordinator, United Way of Connecticut*

This presentation will explore key improvements and innovations we've implemented to elevate our training program. We'll begin by examining data-driven insights, including call monitoring results, post-training surveys, and feedback from orientation, which have highlighted positive outcomes in trainee development and engagement. We've created a more engaging, comprehensive learning environment that meets different learning styles by using diverse training mediums—such as enhanced PowerPoints, Kahoot quizzes, videos, mock calls, discussion groups, and interactive games. We will also discuss changes to our coaching and training structure, which has become more robust through coach calibration sessions, assessments, and professional development opportunities.

## **From Resources to Economic Independence**

*Jeannette Sepulveda, Executive Director, Inland SoCal 211+; Martha Leyva, 211 Careers Program Manager, Inland SoCal 211+*

This presentation will focus on how we created a workforce program due to the needs and gaps we saw from our callers looking for resources. How this program helps those callers become economically independent and helped 211 diversify in the area of funding to assist the contact center. How we used data, and surveys from a captured audience, our callers, to show the need to ask for funding to begin the pilot program that has now been in existence for over 6 years, serving over 2,000 individuals and placing over 600 people into employment while assisting them with other needs to deliver a whole person care model, bringing in over \$3M to the organization to provide this program and services.

## **Guardians of the Taxonomy! Superhero Strategies in Action with the 211HSIS Taxonomy Customization & Targets**

*Nichole Bonilla, Editor, 211 LA, and Corinne Gallois, Manager, Community Resource Database, Findhelp Information Services/211 Central Region*

This intermediate presentation will guide existing users of the 211HSIS taxonomy on

best practices for maintaining their database using the 211HSIS Taxonomy. Strategies will include customizing what terms your database keeps active/inactive, avoiding overuse of targets, and examples of how to make informed indexing decisions.

## **How to Prepare for an Inform USA Certification**

*Sarah Pottelberg, Operations Director, Inform USA; Matthew Hundley, Certification Director, Inform USA*

This presentation will begin with an overview of the program and touch on the most frequently asked questions. We will review the eligibility and application process and outline the online proctoring experience. The session will also focus on questions common to those seeking certification: how and what to study, how to use the Job Task Analysis to prepare and understand the exam composition, and how to answer multiple-choice questions. As time allows, presenters will discuss what steps to take after learning the results of an exam, regardless of whether the examinee passed.

## **Industry guidance on the use of AI from Inform USA's AI Task Force**

*Inform USA AI Task Force Committee Members TBA*

In this session, we will present the initial findings from Inform USA's AI Task Force about the development and use of Artificial Intelligence technologies in the I&R sector. The Task Force conducted an extensive literature review and assessed how other fields are developing standards and governance to ensure the responsible use of algorithmic technologies. We have also collected input from implementers and experts across the I&R sector. Through this process, we have articulated a set of principles that can ensure any development and use of AI in I&R is ethical and equitable. We've identified a range of everyday use cases and a set of risks associated with these uses – and offered guiding questions through which I&R providers can apply these principles to processes of design, governance, and evaluation to mitigate risks and ensure appropriate responsibilities are upheld in the protection of our clients and communities. Finally, this session will offer initial recommendations for industry-wide standards and strategies that can benefit all Inform USA members.

## **Introducing the Nebraska 211 Military and Family Helpline: Supporting All Military-Connected Individuals and Their Families**

*Steve Rippe, Sr. Director United Way of the Midlands; Lauren Kimball, AVP Community Investments United Way of the Midlands; Aimee Salter, Flight Chief of Military Family Readiness, Offutt Air Force Base; TBD Corporate Partner from Omaha, NE*

This panel-led presentation will introduce the Nebraska 211 Military and Family Helpline, a unique initiative designed to provide comprehensive support to military-connected individuals, including active-duty service members, veterans, and their families. Attendees will learn how this helpline, through its collaboration with the Nebraska 211 network and Offutt Air Force Base's Military Family Readiness team, serves as a vital resource bridge between military services and community resources. The panel will consist of Nebraska 211, Offutt Air Force Base and a corporate partner. We will highlight the role of the shared navigator, who ensures seamless assistance for individuals seeking help with both military-specific resources and local community services. This includes housing, mental health, employment, financial aid, and more.

## **Let's Move! Strengthening and Healing Your Brain**

*Sherrard Crespo, LCSW, Director of External Affairs, VIA LINK, Covington, LA*

As help-givers who do predominately work at a desk, sending cues to your brain to indicate safety and initiate healing from stress is crucial to preventing and recovering from burnout. This presentation will inform attendees about how stress hormones affect our brain and how physical cues we send the brain can lessen and heal the effects of toxic stress. We will then demonstrate exercises that are positive for our mind and body to reduce burnout and vicarious trauma, explaining each exercise and its benefits. Bonus: these exercises can all be performed from a desk!

## **Money Matters: Benefit Programs for Low-Income Medicare Beneficiaries**

*Kristin Helfer Koester, Senior Medicare Program Associates, ADvancing States, Jennifer (Jen) Teague, Director Health Coverage and Benefits, National Council on Aging (NCOA)*

Due to rising out-of-pocket costs, low-income Medicare beneficiaries may delay or go without necessary health care, prescription medication, or groceries. This session

will share information and resources on programs that can save an individual thousands of dollars annually on health care and prescription drug costs. It will also provide information about how individuals can maximize their monthly income. Presenters will discuss tools and resources I&R/A professionals can use to learn or strengthen their knowledge of these programs and help find and assist clients who may be eligible for benefits. Attendees will learn about the Medicare Savings Programs (MSPs), Low-Income Subsidy Program (LIS or Extra Help), and the federal legislation that authorizes federal grants to states and tribes to provide outreach and assistance for these programs. NCOA and ADvancing States staff will share tools and resources I&R/A professionals can use.

## **Navigating I&R During Changing Times**

*Lexie Bartunek, Martina Garcia, Inform USA Equity and Access Committee*

The panel discussion will be hosted/sponsored by the Equity and Access committee and will provide a safe space for participants to focus on navigating the information and referral world during the current political landscape. We intend to have speakers from “blue” and “red” states to discuss how federal policies are affecting their day-to-day work and how they can support clients. We will discuss how these impacts also affect staff and provide some self-care resources. The panel will be moderated to keep the discussion open and not veer into argumentative territory.

## **No, We’re Not a Travel Agency: What are AAAs and How Do They Fit in the Information and Referral World**

*Lexie Bartunek, Community Living Connections Program Manager, Washington DSHS - State Unit on Aging*

Between AAA, ADRC, NWD, I&A, OAA, aging, and disability services can be an alphabet soup of confusion. This workshop will examine the programs and services provided through Area Agencies on Aging, how they differ and compare with Aging and Disability Resource Centers, and fit within the Information and Referral network. In addition to programs and services, we will look at partnerships with these agencies throughout their communities.

## **Partnering with Utilities to Improve Safety and Resilience for Vulnerable Communities**

*Alana Hitchcock, Executive Director and CEO, California 211, Kelly Brown, Community Information Officer, Interface Children and Family Services, Presenter TBD, Southern California Edison, Presenter TBD, 211 San Diego*

This session will provide practical insights into how 211 and Aging and Disability I&R organizations can serve as critical partners for utility companies to ensure vulnerable community resilience, safety, and equitable access to essential services during power outages. Utility and 211 partners from California's Public Safety Power Shutoff - Access and Functional Needs Safety Program will share experiences from their different roles and perspectives on how to create the partnerships, infrastructure, and adaptive active response strategies that are required to effectively serve the Access and Functional Needs in preparing and responding to power outages. Attendees will leave understanding the types of services 211s and Aging and Disability I&Rs can provide to help people prepare for power outages and to support their immediate needs during outages. Panelists will share challenges and creative solutions they have encountered serving populations in rural, inaccessible, and under-resourced areas, how to simplify the utility customer's service experience and follow up to ensure their safety and more insights from an ever-evolving program that has now served over 10,000 Access and Functional Needs customers.

## **Reimagining Information & Referral in Community Spaces**

*Thanh Nguyen, Senior Director, Community Outreach and United Way Centers, United Way of Greater Houston*

The Information, Referral, and Assistance (IR&A) field is evolving beyond the traditional frameworks of 211 call centers, Area Agencies on Aging, and Aging and Disability Resource Centers. This session will showcase how transforming community centers into hubs of resources amplifies IR&A's impact by enabling direct, face-to-face connections and fostering collaborative partnerships. Drawing on my journey from managing 211 services to leading United Way community centers, I'll share how embedding agencies within these centers enhances service delivery. These partnerships enable streamlined referrals and allow agencies to accept referrals on-site, creating a one-stop resource hub that addresses community needs more holistically. Attendees will gain insights into the unique opportunities and challenges of expanding IR&A into physical spaces and learn strategies to scale

similar models in their communities. By rethinking IR&A as an integrated, in-person service model, we can empower communities, reduce barriers to access, and ensure that no one is left behind.

## **Social Identity Data Collection (SID): Data for Equity Challenges and Opportunities in I&R**

*Kosal Ky, Director of Strategic Partnerships, Findhelp|211, , Toronto, Ontario; Angela Finateri, Director of Community Impact, Findhelp|211, Toronto, Ontario*

Collecting social identity data (SID) and disaggregated data analysis is an area of increasing interest in the social and community services sector. Since 2021, Findhelp|211 has collaborated with funding partners and agencies within our network to expand our understanding of the benefits and feasibility of collecting SID within the social and community services sector. Consistent gathering of social identity data is essential in obtaining an accurate picture of who is calling 211 and how effectively we serve diverse groups in our city. Panelists will highlight why they think capturing SID data is important, describe current efforts in the agency to collect SID data and discuss how the agency's Equity Framework underpins this undertaking. Finally, they will speak to a larger regional initiative, Data for Equity, working with 50 + agencies on a sector-wide capacity-building initiative in the Greater Toronto Area, Ontario, Canada. Speakers will share tools and resources used by agencies to capture social identity data. The session will also take some time to hear from audience members on recommendations and best practices from others in the U.S. and Canada in social identity data collection

## **Specialized Services Start-Up Strategies**

*Kate Quigley, Senior Director of 211 Specialized Services, 211 Connecticut; Alana Kroeber, Vice President of 211, United Way of Connecticut*

Our goal in offering this presentation is to inform existing 211 centers about accepting new funding streams and partner with new agencies to successfully create and maintain additional Specialized Services contact centers. We will draw from our experiences of effectively expanding our core 211 contact center services to add new contact centers to support specialized initiatives.

## **Strategizing Transportation Options for Unpaid Family Caregivers**

*Meredith Bratton, Program Associate, USAging and the National Aging and Disability Transportation Center; Laura Jane Ward-Strunin, Program Manager, USAging and the National Aging and Disability Transportation Center; Sara Tribe Clark, Director, Eldercare Locator, USAging*

There are over 53 million unpaid family caregivers in the United States; chances are, you speak to at least a few of them daily. Transportation is the top-most reported Independent Activity of Daily Living (IADL) that caregivers provide for their loved ones, according to data from the 2020 Caregiving in the US report. According to the Eldercare Locator, transportation is the number one inquiry to their call center (In 2021, 22% of over 300,000 calls were transportation inquiries). Trips to the doctor, grocery store, pharmacy, and other activities are essential to life. When these trips cannot be done independently, the family caregiver often shoulders the responsibility, potentially impacting their employment, out-of-pocket expenses, and self-care time. Transportation is a social determinant of health for the care recipient, and its importance cannot be overemphasized.

## **The Power of Outreach and Education to Skyrocket I&R**

*Nickie Carter, Director of Outreach, 211info Oregon and SW Washington, TBD*

In this session, attendees will learn about the extensive pillars of the 211info Oregon & SW Washington's Outreach and Education department. Investing in and expanding your outreach program is an instrumental way to broaden your state's 211 services, use, awareness, and understanding. We will focus on examples of taking a leading role across both urban and rural regions via funding contracts, hosting and participating in community events, and using real-time data to inform decisions. Additionally, attendees will engage in hands-on activities, providing immediate takeaways for implementation within your outreach and education programming.



## **Working with Emotion on I&R Calls**

*Yusra Batool, Team Lead 211, Canadian Mental Health Association – Edmonton Region*

Whether it be on a crisis call or when working with someone looking to donate, working with clients in an empathetic and caring way involves working with the feelings connected to their needs. In this session, we will discuss what feelings are, how to recognize different feelings, why they are so crucial to our work, and how to work effectively with them. During this session, participants will learn tools to work with their clients and their feelings during an interaction. We will also discuss some strategies for emotional self-care.

## **SYMPOSIUMS | Monday, May 19th | 9:45 AM - 12:30 PM**

All symposiums will be three hours in length and feature curated content around a central theme or topic.

### **SYMPOSIUM #1 | Suicide Intervention/Prevention and Assisting Difficult Persons in I&R**

#### **Beyond the Storm: I&R's Role in Suicide Postvention and Community Recovery**

*John Plonski, Developer Helping Empathetically as Responders Training, Hicksville, NY*

This workshop explores how I&R agencies can respond effectively to the aftermath of suicide within their communities, a role that's often overlooked but essential. I&R agencies, with their connections to community resources and awareness of local needs, are uniquely positioned to provide structured support and guidance following such a tragedy. This session will explore:

- Community Impact Awareness
- Resource Coordination
- Preparedness and Response Planning
- Building Awareness

## **Military Culture: What it Takes to Ask for Help, and How to Find the Solutions**

*Roderick Gabriel, Military and Veterans Services Supervisor, 211 San Diego*

This presentation addresses the military community's unique challenges when seeking help and provides practical solutions to overcome these obstacles. Focusing on Military Cultural Competency, it explores how military culture and values impact individuals' willingness to ask for assistance. Key points include understanding the distinct mindset and experiences of military personnel, recognizing common barriers such as stigma and pride, and learning how to effectively communicate and offer support in a way that respects their culture. The presentation provides actionable strategies for improving outreach and support services, ensuring they are tailored to the needs of military members and their families. By fostering a deeper cultural understanding, we can create more effective and empathetic approaches to help those who serve

## **Diffusing Difficult Calls and Situations - The Struggle is Real**

*Rudy Bernal, Coaching Manager, 211 LA*

In this presentation, we'll dive into practical ways to manage challenging calls and situations, focusing on building confidence, enhancing communication skills, and readjusting our attitudes. The goal is to equip the participants with practical tools to stay calm, stay in control, remain grounded, and guide conversations toward positive outcomes.

## **SYMPOSIUM #2 | 211 Symposium**

Session information To Be Announced in early March

## **SYMPOSIUM #3 | Aging and Disability Symposium**

Aging and disability professionals in Information & Referral/Assistance (I&R/A) are invited to join the ADvancing States' National Information and Referral Support Center, USAging and other partners for an interactive morning of information sharing and discussion. This is a unique opportunity during the

Inform USA conference for aging and disability I&R/A professionals to gather and focus on industry trends, shared challenges, and promising practices. In many states and communities, information access is an enduring challenge. Consumer demand is high and the information landscape is complex. Partnerships and system-building are not only good practices but may be essential to meeting consumer access and service access needs. Join the Symposium to hear different perspectives on I&R/A collaboration and to explore cross-sector practice examples. Engage in discussion to share ideas on community collaboration and the path forward.

Speakers:

- Bernice Hutchinson, Aging Services Program Specialist, Office of Supportive and Caregiver Services, Administration on Aging, Administration for Community Living
- Lexie Bartunek, CLC Program Manager/AAA Specialist, Home and Community Services Division, Aging and Long-Term Support Administration, Washington State Department of Social and Health Services
- Sara Tribe Clark, Director, Eldercare Locator and Disability Information and Access Line, USAging
- Mary-Kate Wells, Director of Programs, The National Council on Independent Living
- Nanette Relave, Senior Director, National I&R Support Center, ADvancing States

## **SYMPOSIUM #4 | Military Services**

### **Assisting Service Members Reintegration into the Civilian Sector, Post-Military Service**

*Jamal A. Brown, Regional Network Coordinator, Marine for Life Network, Camp Pendleton, CA*

Transitioning from military service to civilian life presents unique challenges for service members and their families. My presentation, "Assisting Service Members Reintegration into the Civilian Sector, Post-Military Service," provides practical insights and resources to facilitate a smoother reintegration process. This presentation aligns with Inform USA's mission to empower individuals and organizations through knowledge-sharing by focusing on a critical yet often underserved population: veterans and their families.

## **The Role of Counties in Supporting Our Reserve Component Service Members, Veterans and Their Families**

*Jim Zenner Director of LA County Military and Veteran Affairs*

Counties are often not thought of and accessible for the military connected community. 56 of the 58 counties in California have a county veteran service officer. We are responsible for ensuring access and educating our community on the resources our counties can provide to support the mission readiness of our reserve component service members and their families, including active duty families. Knowing what your county veteran service officers and what they can provide is critical in ensuring they are connected to needed resources and benefits.

## **Primary Prevention and Resiliency, Resources Across the DoD**

*Mark Munger, Holistic Health Integrator, United States Space Force*

Primary Prevention looks to empower Service Members with the skills which can assist them in being more resilient. Finding ways to develop skills, before risk factors take a toll. Across the Department of Defense our Service Members receive outstanding support. Today I would like to speak on how while there might be slight differences in delivery, all of the Armed Forces have dedicated teams to promote resiliency. Skill building to stay to the left of the "bang" to keep our Service Members on a positive vector for mission accomplishment and a healthy life for themselves and their families.