

GOING THE DISTANCE

Leading the Race to Inform

Inform
— USA —



GOING THE DISTANCE: LEADING THE RACE TO INFORM

2026

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SYMPOSIUMS

[Housing Insecurity Symposium: How Community Navigation is Responding to the Crisis](#)

Housing insecurity is a growing concern across the United States and Canada. The first group to feel this concern is the frontline staff who hear directly from those who are either at risk of being unhoused, immediately facing eviction, or otherwise have housing insecurity challenges. This session will examine how three different Community Navigation providers are responding to the challenge. These three organizations have developed different strategies to handle the challenge and can provide innovative solutions that may work in your community.

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

Join Heather Black and James Collins from United Way Worldwide for a future-focused session designed to bring 211 leaders together to engage and interact as we consider our collective opportunities for the future. This workshop-style session will include updates from United Way Worldwide, an overview of emerging data dashboard tools, and a collaborative discussion on what it means to build a Thriving 211. Participants will have the opportunity to reflect on the evolving role of 211 in communities, explore future opportunities for the network, and workshop ideas with peers from across the field.

Whether you are looking for the latest updates, practical tools, or a space to think creatively about the future of 211, this session will offer meaningful insights and opportunities for collaboration. Please join us for what promises to be a dynamic and interactive conversation as we explore the future of 211 together.

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

Attendees are invited to join the National Information and Referral Support Center administered by ADvancing States and our partners USAging and the National Council on Independent Living for an engaging morning of learning and connection focused on aging and disability Information & Referral/Assistance (I&R/A). Held during the 2026 Inform USA Conference, this

Symposium offers a dedicated space for aging and disability I&R/A professionals to come together and focus on shared priorities, common challenges, and promising practices. Across state and community programs, increasing demand for information and access services—combined with limited resources—continues to stretch the capacity of the I&R/A workforce. This session will explore practical strategies to strengthen and sustain workforce resilience while promoting professional well-being. Participants will hear innovative approaches from program leaders and engage in peer discussion to exchange ideas and build their own “wellbeing playlist” to support long-term I&R/A workforce resilience.

OPENING KEYNOTE ADDRESS – Driven but Drained: The Hidden Costs of Mission-Based Work

Michelle Quist Ryder, PhD

In the nonprofit world, burnout is all too often treated like a badge of honor. This keynote exposes the deep toll of being “driven by mission,” from toxic productivity to chronic underinvestment in staff well-being. It’s time we stop accepting exhaustion as proof of commitment and start redefining what sustainable impact really means.

CLOSING KEYNOTE ADDRESS – The Rhythm of Renewal: Evolving Self-Care in an Age of Change

Tammy Charles

As the pace of our world accelerates, self-care is evolving from bubble baths to soul care. In this inspiring keynote, Tammy Charles, Chief Revenue Officer of Black Innovation Alliance, explores how to reconnect to joy, create new rhythms, and find balance amid the demands of service work. Through honest reflection and practical tools, she helps attendees identify what truly replenishes them in this season and

release what no longer does. You'll leave grounded, renewed, and ready to keep leading with purpose.

GENERAL SESSIONS

211 Database Partnership

Heather Sedlack, Executive Director, United Way of Southwestern Pennsylvania; Molly Morrill, Allegheny County Department of Human Services

This presentation highlights the innovative collaboration between the Allegheny County Department of Human Services and PA 211 Southwest to centralize resource information and improve access for individuals in need. By leveraging 211 data and client surveys, presenters will discuss how to identify emerging trends and evaluate the effectiveness of the social services network in meeting community needs. The session will also explore how data sharing enables automated referrals from 211 to higher levels of support and facilitates real-time responses to crises, such as SNAP benefit delays. These strategies demonstrate how integrated systems and timely data can strengthen the safety net and enhance service delivery.

AI in Action: How we Improved Helpline Efficiency and Agency Support

Mariam Schrage, Senior Associate Director, Contact Center Operations, Alzheimer's Association

This session will share how the Alzheimer's Association successfully integrated AI into its 24/7 Helpline to enhance efficiency and support agent documentation. The presenter will discuss evaluating multiple AI tools, selecting a tool to assist agents with documentation, and implementing it through careful testing and piloting. Attendees will learn how we addressed challenges, optimized instructions and prompts, and developed clear staff guidelines. We'll also cover how feedback from staff and managers shaped improvements and how ongoing evaluation ensures AI continues to complement daily operations.

Assessing Supports at a Glance: A Practical Tool for Navigators or Connecting the Dots – Identifying Supports and Gaps During Intake

Katharine Ragon, University of Missouri Kansas City, Institute for Human Development

Navigators often need to understand what supports individuals and families have already accessed or attempted in order to make effective referrals, yet this information can be difficult to capture quickly during intake. This session introduces a simple, practical snapshot approach that helps navigators assess existing supports, identify gaps, and avoid duplicating efforts. Participants will learn how to use this approach during intake or follow-up to guide more accurate referrals and resource options. The session emphasizes efficiency, clarity, and real-world application within navigator workflows.

Beyond Marketing: How Strategic Communications is Every Leader's Job

Elizabeth Burrows, Director of Development & Community Relations, 211 Palm Beach/Treasure Coast; Kaley Newby, Director of Compliance & Quality Improvement, 211 Palm Beach/Treasure Coast

Strategic communications isn't just a marketing function—it's organizational infrastructure that supports every part of an organization. Leaders across finance, programs, operations, development, and executive teams bring critical insights that help shape an effective communications strategy, even if communications isn't their primary role. This session explores how engaging non-communications leaders strengthens strategic planning, improves alignment, and enhances organizational impact. Participants will leave with a clearer understanding of their role in carrying and implementing the strategy.

Community Navigation in the Workplace: An Innovative Employee Benefit

Laura Rowell, Associate Director, Investor Education Foundation Programs, FINRA Investor Education Foundation

Community Navigators already possess the core skills needed to help individuals stabilize their lives—active listening, assessment, referrals, and problem-solving. This session invites navigators, 211 and 988 professionals, and human service leaders to explore how those same skills can be applied in workplace financial wellness programs serving low and moderate-income employees. Participants will get a sneak peek at a new national training program launching in 2026, developed by the FINRA Foundation in collaboration with United Way Worldwide, Inform USA and Working Bridges that prepares navigators to succeed as Workplace Resource Specialists. The session will highlight how working with employees through their workplace can deepen impact, strengthen outcomes, and open new professional pathways for community navigation professionals.

Connecting, Promoting, and Preventing: Reaching Your Community

Andy Bethke, Training and Education Coordinator, Inform USA

With all of the important and immediate work that needs to be done through the contact center, community outreach may be an afterthought (or no thought at all)! However, Community Navigation outreach can be a key piece of an organization's strategic plan when given fair consideration. Good outreach can identify and engage those most in need, facilitate access to help before a situation becomes a crisis, build community trust and appreciation for all contact center services, and, through real-world feedback, enhance the Community Navigation organization's service delivery, resource database, and community impact. The speaker has a lengthy history of outreach for an Aging and Disability Resource Center, although the concepts are applicable to any Community Navigation organization.

DE211 Live: Leveraging Mobile Technology to Meet the Community Where They Are

Jennifer Fromme, Director, Delaware 211, Audrey Cooper, Child Development Specialist, Delaware 211

DE211 Live is a mobile service model designed to close the gap between referrals and real-time help by equipping outreach staff with iPads for on-the-spot program intakes. Built from real frontline experiences, this approach enhances—rather than replaces—direct service by allowing staff to complete applications for programs like Help Me Grow, Stand By Me, and the Delaware Housing Hub while meeting community members where they are. The session will share practical workflows, unexpected challenges, and lessons learned from launching technology-enabled outreach in diverse settings across Delaware. Participants will walk away with replicable strategies that improve service outcomes, reduce missed connections, and strengthen trust with community partners.

Driving KPIs Through Quality, Data, and Leadership Development in Contact Centers

David Mercado, Senior Director of Operations, United Way of North Carolina

In this interactive session, attendees will explore how to drive strong contact center KPIs by focusing on quality, data, and intentional staff development. Participants will learn practical strategies for building a culture of excellence—where every call prioritizes the consumer’s needs while capturing the data that fuels community impact. The session will highlight coaching techniques, quality assurance practices, and leadership development tools that improve service delivery and build stronger teams. Real-world examples and peer insights will spark new ideas and equip attendees to elevate performance in their own contact centers.

Enhancing Safety and Rapport: Evidence-Informed Approaches from the 988 Suicide & Crisis Lifeline

Taylor Funke, Manager of Clinical Standards, Vibrant Emotional Health; Riley Juntti, Clinical Standards, Vibrant Emotional Health

Community Navigation professionals are often the first point of contact for individuals experiencing stress or suicidal crisis. These individuals may be referred to the 988 Suicide & Crisis Lifeline for additional support, but what happens after you refer individuals to the 988 Lifeline? This session will explore the evidence and principles that shape the 988 Suicide & Crisis Lifeline's Safety Assessment Model, showing how clinical research, practical experiences, and person-centered approaches come together to guide an effective assessment of suicide safety. Participants will learn the foundational elements of how the 988 Lifeline model addresses suicide safety and de-escalation, while maintaining rapport, fostering empathy, and promoting collaboration. This presentation seeks to build understanding of 988 Lifeline's services and confidence in explaining and referring individuals in suicidal crisis to the 988 Lifeline.

From Burnout to Belonging: A Peer-Support Model for Frontline Community Navigators

Richard Shutes, Voice of Rich, LLC

Professionals who provide community navigation or crisis support often carry the emotional weight of those they serve. This session explores the development of a nationwide peer-support model that provides frontline staff with a safe, confidential space to connect, debrief, and share resilience strategies. Participants will learn how the concept grew from local conversations into a collaborative, sector-wide initiative that promotes well-being and retention. Examples will include experiences from multiple systems, such as 211, 988, and ADRCs, while offering a framework adaptable to any organization.

From Downstream to Upstream: Leveraging Community Navigation for Systems Change

Ashley Peltier, Executive Director, Connect Mat-Su

This session will provide an overview of three systems-level projects that Connect Mat-Su is advancing to strengthen and modernize Information & Referral services. Presenters will explore how these initiatives support coordinated intake, improve referral pathways, and enhance collaboration between Community Navigation,, healthcare, and community-based partners. The session will highlight practical applications, lessons learned, and considerations for aligning systems with Inform

USA Standards. Attendees will gain actionable insights to support scalable, community-wide approaches to service delivery.

From Strategy to Service: Leading Virtual Assistant Adoption in 211 Without Losing Trust or Quality

Myria Ming, Director 211, United Way of the Midlands; Lindsay Paulsen, 211 Database Resource Manager, United Way of the Midlands; Mark Montgomery, Vice-President, 211, United Way of the Midlands

As 211s explore virtual assistants and AI-supported tools, leaders must balance innovation with mission, data integrity, and workforce trust. This session examines virtual assistant adoption from three interconnected perspectives: executive leadership, resource database strategy, and frontline staff implementation. Drawing from a real-world 211 pilot, presenters will share lessons learned about board engagement, taxonomy readiness, CRM integration, and change management for Community Resource Specialists. Attendees will leave with a practical framework for evaluating, implementing, and governing virtual assistants that strengthens – rather than disrupts – service delivery.

Supporting the Well-being of Hotline Workers Through Training and Educational Resources

Symone McLaughlin, Manager, Senior Instructional Designer, Vibrant Emotional Health

Crisis counselors on the 988 Suicide & Crisis Lifeline face a heightened risk of compassion fatigue and vicarious trauma due to the emotionally intense nature of their work (Kitchingman et al., 2018). Therefore, 988 strives to emphasize crisis counselor well-being through training and educational resources to boost confidence and resilience, a focus that crisis counselors have consistently expressed appreciation for. For example, one noted on a feedback survey, “I love the tips about how I can self-regulate when a familiar caller frustrates me.” How can we develop trainings and educational resources that support the well-being of those who work on a hotline so that they can continue to provide high-quality care to help-seekers? This presentation explores this question by showcasing creative approaches used within 988.

Industry Standards – Your Voice Matters!

Jennifer Abels, Director of Standards & Excellence, Inform USA; Stacey Hachmann-Gomez, Executive Director, Community Access Line of the Lakeshore, Inc; Gina Strafford-Ahmed, Administrator of Intake & Referral, DuPage County Department of Community Services

The Inform USA Standards are the guideposts of quality for all types of Community Navigation programs, and they are updated when members share perspectives on changes in the field. You are invited to this session, where you will walk away with a better understanding of the standards revision process and its impact on Inform USA programming. Also, in a small-group format, you will have the opportunity to share your thoughts on which standards/quality indicators need updating. We want to hear from you!

Leading from the Middle: Unlocking the Power of Middle Management

Kaley Newby, Director of Compliance & Quality Improvement, 211 Palm Beach/Treasure Coast; Elizabeth Burrows, Director of Development & Community Relations, 211 Palm Beach/Treasure Coast

This session explores how leadership style, communication patterns, and middle-management dynamics shape the effectiveness of Community Navigation teams. Participants will identify their own leadership and communication styles, learn how these influence team performance, and gain practical tools to help middle managers confidently manage up and manage down. Through real-world examples and interactive exercises, attendees will leave with strategies to strengthen camaraderie, improve staff support, and build a more resilient organizational culture.

Leading Teams to Better Serve Older Adults: Practical Strategies for Culture, Collaboration, and Client Engagement

Emily Tisdale, Executive Director, University of Indianapolis Center for Aging & Community

Community navigation and aging service staff often juggle complex client needs while managing team dynamics and organizational pressures. This session provides

practical strategies to align teams, strengthen culture, and improve collaboration — all while enhancing engagement and service for older adults. Participants will leave with actionable tools they can implement immediately to boost team performance and client outcomes.

Leading with Empathy: Coaching Your Team to Deliver Compassion-Delivered Community Navigation

Roderick Gabriel, 211 Military Client Services Manager, 211 San Diego

This session equips leaders with evidence-based strategies to teach and model empathy, compassion, and high-impact soft skills within Community Navigation environments. Participants will learn how leadership behaviors directly influence call quality, staff confidence, and alignment with Inform USA Standards and Quality Indicators. Through practical demonstrations and research-backed techniques, leaders will discover how to integrate empathic communication into supervision, coaching, and team culture. Attendees will leave with actionable tools, scripts, and coaching methods they can immediately implement with their teams. The session blends professional expertise with lived experience to emphasize how human-centered leadership elevates both staff performance and client outcomes.

Leveraging Community Navigation to Drive Medical Case Management

Avery Popov, Director of Enhanced Care Management, 211 LA

This session will focus on how conventional Community Navigation practices can be leveraged to assist in screening and enrollment for medical care coordination programs. We will delve into the need for eligibility screening, training of CRA staff, and a fluid connection between call, assessment, and enrollment. This session will discuss how existing health information exchanges (HIEs) and portals can assist in this work. 211 LA's Enhanced Case Management program has used this approach and will provide it as an example of how technology and Community Navigation practices can be used in this space of healthcare.

Mapping Supports that Actually Work: Helping Callers Identify More than One Way Forward

Katharine Ragon, University of Missouri Kansas City, Institute for Human Development

Navigation conversations often focus on formal services, even though most people rely on a combination of personal relationships, community resources, and system supports. This session helps navigators broaden the way support options are identified and discussed during intake and follow-up. Participants will learn how to guide callers in recognizing multiple sources of support and understanding how those supports can work together. The session emphasizes realistic, person-centered navigation that reflects how people actually get help in their daily lives.

Military Resources and the Community

Mark Munger, Holistic Health Integrator, United States Space Force

No matter the community you serve, your agency is supporting the armed forces. It isn't just about areas with a military installation nearby. It is about service connection, and you will find that only 1% of the population in your communities are veterans. Some might be a part of your resources for the aging, while others might have just transitioned and are starting a new chapter. How we integrate your resources into a veteran or service member, and how to help them access them, is worth a discussion.

Puzzle Pieces and Pathways: Making Sense of Caregiver Navigation

Zachary Trammel, Program Manager, Caregiver Navigation Services, USAging; Darya Rahbar, Program Manager, Caregiver Navigation Services, USAging

Informed by the National Strategy to Support Family Caregivers, the ACL-led National Caregiver Support Collaborative aims to achieve greater recognition, support and inclusion of family, kin, and tribal caregivers across the country. The Caregiver Navigation Services component of the initiative, led by USAging, aims to improve the Aging Network's ability to help caregivers access the vital resources they need at the right time and in the right way. This session will ground attendees in the core concept of caregiver navigation and provide an overview of current practices, assessment

approaches, and key staffing roles. Presenters will highlight how community-based providers can partner effectively with Area Agencies on Aging, featuring two successful case examples. Attendees will also be introduced to evaluation tools designed to help organizations measure outcomes and demonstrate impact.

Supporting Individuals with Seizures and Epilepsy

Thomas Buckley, Senior Director, Health Information Services, Epilepsy Foundation of America

This session will discuss some of the common challenges people with seizures and epilepsy have reported experiencing when reaching out for assistance to the Epilepsy Foundation's Epilepsy and Seizures Helpline. We will review the different types of seizures and epilepsies, co-morbidities, treatments, mortality, and how some seizure activity can be mistaken for inappropriate behaviors that have resulted in a denial of services. Finally, we will discuss resources available (not just the Epilepsy Foundation) to help people affected by seizures and the epilepsies, their families, caregivers, and those who support them.

Taming the Term-Jungle: A Field Guide to 211HSIS Taxonomy Customization & Smart Indexing

Nichole Bonilla, Taxonomy Editor for 211HSIS, 211 LA; Jennifer Palmer, 211 Southwest Database Coordinator, United Way SW Pennsylvania; Shirley Fulco, Database Director, 211 Northeast Michigan

The presentation will be an intermediate-level training on best practices when customizing 211HSIS terminology. It will include target usage. This intermediate presentation will guide existing users of the 211HSIS taxonomy on best practices for customizing which terms their database keeps active/inactive, correct use of targets, and examples of how to make informed indexing decisions.

The Value of Taxonomy Use in the Healthcare Sector: 211HSIS Contributions to the Gravity Project and Social Determinants of Health (SDOH)

Nichole Bonilla, Taxonomy Editor for 211HSIS, 211 LA; Avery Popov, Director of Enhanced Care Management, 211 LA; Chiara Cameron-Wood, Senior Director of 211, United Way of Greater Cleveland

The session will detail how 211HSIS has engaged with the healthcare sector through its contribution to the Gravity Project: a high-level set of terminology for reflecting social determinants of health (SDOH) concepts. This terminology set was achieved through collaboration with 211LA, 211 San Diego, Unite Us, Findhelp, and Epic. Through this project, 211HSIS has worked not only to represent its taxonomy system but also to emphasize the value of 211s and specialized Community Navigation organizations that curate referral databases using this tool.

Using Unmet Needs Data to Increase Resource Curation and Community Engagement

Kevin Evans, Deputy Director, Indiana 211, Indiana Family and Social Services Administration; Shari Bowers-Dueker, Community Engagement Coordinator, Indiana 211, Indiana Family and Social Services Administration

This session focuses on helping participants understand what unmet needs data reveals about community challenges and service gaps. It guides learners through how to analyze trends in unmet needs data to identify patterns and emerging issues. Participants will also learn how to apply these insights to strengthen resource curation strategies and improve community engagement. Overall, the session connects data analysis to practical actions that enhance service delivery and impact.

Working Through Complex Conversations in Community Navigation

Lexie Bartunek, Community Living Connections Program Manager, Washington State Community Living Connections; Karen Marc, Senior Director, 211 Maryland at United Way of Central Maryland; Avalon Mallory, United Way of West Florida

Community Navigators regularly have difficult conversations, both over the phone and in person. Focus is often on “difficult callers” and de-escalation techniques. This session will focus on other factors that could be behind some of those “different” conversations, such as caller accessibility needs via language line and/or video phone, limited cell phone minutes causing rushed conversations, and combative callers. Presenters will share real examples and role-playing scenarios.

You are a Person Too: Using Person-Centered Practices to Support Self-Care

Lexie Bartunek, Community Living Connections Program Manager, Washington State Community Living Connections

Community Navigation providers are continuously being asked to do more with less, especially in today's world. Agencies are closing down, and services are becoming scarcer, leading navigators to have more conversations about limitations while continuing to be person-centered. Providing true person-centered planning requires authentic connections with those we serve, which is unsustainable without self-care, preventing compassion fatigue, and ensuring ethical, effective support. This session will take a deeper look at the correlation of individual self-care and the abilities to provide person-centered services and supports to frontline staff, managers and the communities that we serve.

SYMPOSIUMS | Monday, May 18th | 9:45 AM – 12:30

PM

All symposiums will be three hours long and feature curated content centered on a central theme or topic.

SYMPOSIUM #1 | Housing Insecurity: How

Community Navigation is Responding to the Crisis

Housing insecurity is a growing concern across the United States and Canada. The first group to feel this concern is the frontline staff who hear directly from

those who are either at risk of being unhoused, immediately facing eviction, or otherwise have housing insecurity challenges. This session will examine how three different Community Navigation providers are responding to the challenge. These three organizations have developed different strategies to handle the challenge and can provide innovative solutions that may work in your community.

Speakers:

Aarti Goswami, United Way of Greater Houston

TBD, United Way of the Midlands

Patricia Trotta, Partnership for Housing Affordability

SYMPOSIUM #2 | 211 Symposium

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Speakers:

Bernice Hutchinson, Aging Services Program Specialist,
Office of Supportive and Caregiver Services, Administration
on Aging, Administration for Community Living (*invited*)

Victoria Elridge, Commissioner, Department for Aging and
Independent Living, Kentucky Cabinet for Health and
Family Services,

Edward Clark, Aging Services Branch Manager and
Director, State Health Insurance Assistance Program,
Kentucky Department for Aging and Independent Living

Sara Tribe Clark, Director, Eldercare Locator, USAging

Mary-Kate Wells, Director of Programs, The National
Council on Independent Living

Nanette Relave, Senior Director, National I&R Support
Center, ADvancing States

Kristin Helfer Koester, Senior Medicare Program Associate,
ADvancing States