



2024 GRAND GATHERING SESSIONS

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Symposium #3 | Aging and Disability Resources

- Sessions to be announced at a later date

GENERAL SESSIONS

211 as a Community Utility

Richard LaPratt, Executive Director of 211 Metro Chicago (United Way of Metro Chicago), Chicago, IL; Rob Bradford, Consultant, Bradford Business Solutions/211 Metro Chicago, Chicago, Illinois Gabriel Garcia, Navigation Center Director, 211 Metro Chicago, Chicago, Illinois; Hai-Chau Carroll, Quality Assurance and Training Sr. Manager, 211 Metro Chicago, Chicago, Illinois; Ian James, Data and Technology Director, 211 Metro Chicago, Chicago, Illinois; Conner Bennett, Marketing and Outreach Specialist, United Way of Metro Chicago, Chicago, Illinois

211 Metro Chicago was built by its community, with the goal of being a trusted entity. Our community partners (city, county, nonprofit and for-profit entities, as well as foundations) have a vested interest in the success of our 211 service as a utility in Cook County. This presentation will show how the work with each of these partners have provided a road map for success with both fund development, technology, and innovation, as well as hiring and management practices that can exceed excellence across all quality metrics and established controls.

Accessible Content: Make sure your message reaches everyone!

Max Hornick, Community Education Specialist, Disability Network Southwest Michigan, Kalamazoo, MI; Miranda Grunwell, Community Education Program Manager, Disability Network Southwest Michigan, Kalamazoo, MI

In this workshop, learn how to create content that is accessible to everyone. Some people with disabilities may not be able to see your page, read your words, or hear your recording. Creating accessible content means they can still get your message. Learn how to use best practices to be inclusive in all your communications.

Aging and Disability Partnership Strategies to Improve Transportation Options and Services

Katherine Newman, Training and Technical Assistance Specialist, Easter Seals/National Aging and Disability Transportation Center, Tappahannock VA; Zach Trammel, Program Manager, USAging, Washington DC

One of the biggest challenges facing older adults and people with disabilities is finding transportation services in their community that meet their needs. In many communities, information and referral assistance (I&R/A) programs are key in helping consumers navigate community transportation options and address transportation needs. This session will focus on how to find resources in meeting the needs of older adults and people with disabilities seeking transportation and mobility options in their community and highlight the partnership between the National Aging and Disability Transportation Center (NADTC), Eldercare Locator and the Disability Information and Access Line (DIAL) and feature local transportation one-call, one-click center and mobility managers.

AI + I&R = A Perfect Match!

Neil McKechnie, Software Architect, Consultant, San Francisco Bay Area, CA

Artificial Intelligence (AI) continues to transform society. Nearly every aspect of operating an I&R service can benefit from the thoughtful application of AI tools and techniques. While ChatGPT is incredibly useful, it's really just a showcase for the power of Large Language Models (LLMs) and Generative AI behind it. In particular, the ability for software to understand the sentiment behind natural human language opens immense opportunities for I&R, from data curation to service delivery and helpseeker self-service. As well, since it is based on sentiment, AI has become very

good at translating between any two languages, and can easily modify for higher or lower levels of literacy – which can help us reach far more people in need than ever before. While the responsible and ethical use of AI is paramount, that is not the focus of this session. We will instead show and discuss opportunities and possibilities of bringing together the deeply rich best practices and standards of our field, with the powerful capabilities of AI tools.

Alzheimer's Association Helpline: How We Help

Mariam Schrage, Sr. Associate Director Contact Center Operations, Alzheimer's Association, Chicago, IL

This session will provide an opportunity for attendees to learn more about the support provided through the Alzheimer's Association 24/7 Helpline. Understand more about the topics that caregivers and people living with dementia reach out about. Hear the techniques used by agents to provide callers with emotional support and collaborate with them to work towards an action plan for the caller's goal. Receive practical tips that can be shared with clients related to behaviors and communication. Attendees will walk away from this session understanding when to provide the Helpline number to your clients.

Anticipate and Mitigate the Risks of AI in I&R

Greg Bloom, Senior Director of Strategy and Partnership, Inform USA

There's been a lot of hype about Artificial Intelligence (AI) – for decades, really, but now more than ever. Despite the hype, there are few (if any) precedents for successful uses of "generative AI" tools – at least not in contexts in which success depends on accuracy and fairness. Instead, we have many, many, many examples of failed uses of AI that have caused embarrassment to the institution that deploys the technology and/or harm to its users or others. The fact that AI technologies have a terrible empirical record doesn't mean that we shouldn't experiment with them under any circumstances – but it is a reason to uphold a precautionary principle. This session will discuss prospective risks and harms from the use of I&R in an I&R context. It will examine which of those risks are more immediate and may deserve attention sooner. Finally, it will discuss principles that should be upheld to ensure that use of AI in I&R is responsible and equitable.

Assessment vs. Conversation: The Importance of Active Listening (Skills for Responding to Suicide)

Sherrard Crespo, LCSW; Director of Outreach & Prevent Child Abuse Louisiana (PCAL); VIA LINK; Covington/LA/USA

Any I&R contact can find itself developing into a crisis call. It is important that all professionals and volunteers in the helping field have a level of comfortability with handling a contact in which suicide ideation presents itself. You do not need to be a clinician or trained in an assessment tool to support someone who finds themselves reaching out for support when they are experiencing suicide ideation. Utilizing the tools of active listening and knowing what you are listening for can facilitate a conversation in which a person will feel heard and supported and can create a safety plan. From there further information & referral can be conducted.

Conversation is proven to be a better tool than assessment alone when supporting someone with suicide ideation. Gain the knowledge to know what you are listening for and the skills to properly respond to suicide ideation and risk.

Being There (Remotely): Surviving and Thriving in a 100% Virtual Contact Center

Kristen Engelbrecht, Director, 211, United Way of Greater Kansas City, Kansas City, Missouri; Lenetta Warren, Daytime Call Center Manager, United Way of Greater Kansas City, Missouri and Brian Shapley, Afterhours Call Center Manager, United Way of Greater Kansas City, Missouri

The COVID-19 pandemic created challenges as well as opportunities for I&R service delivery, including some organizations transitioning to remote call center operations for health/safety concerns. After more than 3 years, United Way of Greater Kansas City 211 has transitioned and successfully remained a remote operation. Explore how Kansas City 211 serves 23 counties in daytime hours and the entirety of the states of Kansas and Missouri in after-hours. This operation has maintained remote operations while increasing performance, achieving Inform USA reaccreditation, and growing call volume as well as revenue. This session will look at the changes, challenges, and benefits of maintaining an entirely remote I&R operation, including topics such as: hiring/exiting employees, training, technology, oversight/performance, communication, and team culture.

Beyond Marketing: Navigating Outreach in the Information and Referral Landscape

Jordan Marsh, Resource Manager, 211/LIFE LINE (Goodwill of the Finger Lakes), Rochester, NY

This presentation clarifies the distinction between outreach and marketing in the information and referral domain. Tailored for professionals in this field, the session offers practical solutions to enhance outreach efforts. Attendees will learn strategies and techniques to optimize community engagement, foster robust connections, and improve service delivery.

The Bias Against Bias – The Pizza Perspective

John Plonski, Training Consultant, Hicksville, NY

The session will move beyond the causes of bias into how helpers can develop a toolkit of practical approaches to handle biases in ourselves and those we assist. By exploring biases' underlying causes and proposing effective strategies to address them, the goal is to foster a more inclusive and empathetic approach to bias management that empowers us to “work with” the biases we meet.

Breaking News - Updated Standards. What has changed?

Jennifer Abels, Accreditation Director, Inform USA; Sandra Ray, Program Director, Inform USA; Pam Hillier, Inform USA Standards Chairperson; Jennie Pollak, Inform USA Standards Vice Chairperson

In this presentation, members of the Standards Committee will provide an overview of the process of a Standards review as well as highlight what has changed in the latest edition.

Bridges Out of Poverty - A Useful Overview for I & R

Sarah Kile, Director of Community and Partner Engagement, Gladwin, MI

Individuals living in poverty globally often find themselves caught up in the immediacy of addressing pressing concerns. The very essence of life in poverty is such that the assurance of tomorrow is not guaranteed. Indeed, ensuring a sustainable present can pose a formidable challenge. These established patterns make working with individuals from generational poverty demanding, but a deeper understanding can lead to more favorable outcomes. This overview of Bridges out of

Poverty aims to empower you by offering a more profound insight into poverty and the challenges faced by those experiencing it. As you develop empathy and a heightened awareness of the obstacles encountered by individuals in poverty, you will be better prepared to establish connections and create opportunities for improved and more respectful service.

Building Community Trust through Transparent Data Practices

Katherine Delgado, Chief Program Officer, American Association of Suicidology, Nashville, TN

In an era of heightened sensitivity to data privacy, this workshop aims to empower nonprofits with the knowledge and tools necessary to establish and maintain trust within their communities through transparent data practices. This session invites participants to explore the importance of clear communication, informed consent, and user empowerment in ensuring that individuals feel secure when using technology for community and mental health engagement and support. Learn strategies for building trust with users through transparent data practices and gain practical insights into incorporating privacy-centric principles into technology and services. Participants will explore establishing privacy policies that are compliant with regulations as well as reflective of the organization's commitment to transparent data practices. This approach aims to create a culture where privacy is not just a compliance requirement but a shared value, ingrained in the organizational ethos.

CHWs? What are those?!?!

*Melissa Ladd Patnode, 211 Program Supervisor, Central Michigan 211, Jackson, MI;
Shannon Lijewski, CEO, Everyday Life Consulting LLC, Midland, MI,*

Have you heard of CHWs? CHWs are Community Health Workers. Community Health Worker is a very broad title, and concept. Many communities have seen the value of CHWs in their organizations and have seen the positive impact they have on their clients. But how are CHWs beneficial to the information and referral sector? In this session you will learn what are CHWs, how they are being used in many sectors, how they can be an asset to the information and referral field, and how to train and develop your staff to be CHWs.

Coaching Micro-Certification: Panel Presentation from Current Certification Holders

Sandra Ray, Program and Education Director, Inform USA

This session is a panel presentation comprised of several current holders of the coaching micro-certification. Panel participants will discuss how the certification led to increases in their coaching skills and helped them achieve a higher level of professionalism for their current role, as well as preparing them for future roles in the I&R industry.

Collecting and Applying Inclusive Data – Allowing for Equitable Access to Navigation and Services

Nicole Abruscato, BSW, RSW, CRS, CRS-Coaching, Manager, Central Intake & Access, SHIP, Mississauga Ontario; Shereen Rampersad, Equity, Diversity and Inclusion Manager, SHIP, Mississauga Ontario

This presentation will focus on how to collect and apply inclusive data to allow for equitable access to services. Attendees will be taking a close look at identifying gaps and barriers to navigation, what is an equity assessment tool and how to use this as an evaluation tool on intake processes, forms, assessments and navigation calls. Lastly, we will put this all together and support the implementation of an action plan.

Combining Forces for Caregivers

Natasha Stewart, Manager 211 Programs, United Way Worldwide, Alexandria VA

Family Caregiving is fast becoming the number one dependent care issue in America. I&R programs are poised to provide support to caregivers to help them support themselves and those they care for. This workshop will highlight new partnerships being leveraged to support the prevalence of family caregiving in our communities.

Connecting Veterans and Spouses to Employment Resources

Mr. Rick Butler, Marine for Life Section Head, Headquarters Marine Corps, Quantico, VA.

Leaving Active Duty comes with many unique challenges and sometimes can cause financial stress. It can be daunting for military members to find work and adjust to the civilian workplace and culture. This workshop will identify barriers to employment,

challenges to adjusting to the civilian workforce culture, and will highlight resources and organizations that assist veterans and their spouses with employment opportunities.

Cybersecurity and Data Privacy - Managing Risk in a Digital Age

Karen Milligan, Executive Director, Ontario 211 Services, Ontario, Canada; Baijul Parikh, Director of Data and Digital Strategy, Ontario 211 Services, Ontario, Canada

The purpose of this session is to provide Managers and Leaders with a better understanding of the risks related to Cybersecurity and Data Privacy, and provide practical resources, best practices and recommendations to I&R professionals to safeguard our systems and the valuable data we collect about the people we serve.

Dialing into Empathy: A Trauma-Informed Approach to Quality Assurance in Call Centers

Ciara Doyle; Kellie Merdink, Quality Assurance Manager, 211info, Independence, OR;

This session will provide a history and overview of Quality Assurance (QA) programming, and the different tools available. Presenters will discuss how they have set up both call center and Resource QA practices. The session will incorporate the value of using a trauma-informed lens while doing QA and how QA can influence trauma-informed and equitable practices in your work.

For the Greater Good: Why and How to Ask Demographic Questions

Lacey Hanson, I&R and Resource Program Lead, ADRC of Oregon, Portland, OR

Asking demographic questions, for many I&R specialists, is the most uncomfortable part of the job. But in this era of reconciliation and social justice, learning how 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.

Helping Recently Arrived Immigrants Through I&R

Fernando Morales, 211 Regional Directors, United Way of Northern Utah, Ogden, Utah

This session seeks to educate I&R practitioners on what resources immigrant newcomers may need to integrate into communities across the country.

How to prepare for an Inform USA Certification Exam

Sarah Pottelberg; Matthew Hundley

This presentation will begin with an overview of the program as a whole and touch on the most frequently asked questions. We will review the steps in 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.

Identifying and Supporting Unpaid Family Caregivers through Information and Referral

Lexie Bartunek, Community Living Connections Program Manager, Washington State unit on Aging

Many people who call into Information and Referral do not identify themselves as caregivers for a variety of reasons. This session will discuss some reasons for this as well as some conversations with callers to help them recognize their caregiving roles and supports that may be available in their communities. Presenters will specifically share how the voices of these caregivers have helped shape the Washington State Family Caregiver Support Program and how some of these tools may be used in your area.

Navigating Funding Streams: Collaborative Strategies for Local, State, and Federal Support

Sarah Kile, Mayor, Gladwin, MI; Panel TBD

This conference panel presentation is designed to guide attendees through effective approaches for securing funding by engaging with local, state, and federal legislators. The session aims to provide insights into the intricate process of accessing financial resources and building successful partnerships with lawmakers at various levels of government.

Navigating Taxonomy Audits: Practical Approaches for Data Accuracy

*Jen Palmer, PA 211 Database Coordinator, United Way Southwest PA, Pittsburg, PA;
Jordan Marsh, Resource Manager, 211/LIFE LINE, Goodwill of the Finger Lakes,
Rochester, NY*

This presentation, led by two seasoned professionals in database curation, delves into practical strategies for optimizing data accuracy through effective taxonomy audits. Drawing on experiences with iCarol, RTM, and VisionLink, the presenters will provide technical suggestions and theoretical guidance, ensuring participants gain insights applicable to their platforms.

Not Just an Inform USA Standard: Program Evaluation & Quality Assurance

Bob McKown, Accreditation Reviewer, Inform USA

The purpose of the workshop is to provide an overview of program evaluation for I&R services. It will answer questions frequently asked by those in the accreditation process like: What is program evaluation? What does program evaluation achieve? Learn some of the basic evaluation terminology. The presenter will also focus on quality assurance tools and outcome measures common to I&R programs.

Spring = Time for Clean-up: Pruning Taxonomy Codes and Resources from Your Database

*Kristen Fogerty, Greater Twin Cities United Way 211 Resource Program Manager,
Minneapolis, MN; Nichole Bonilla, Editor, 211LA, Los Angeles, California*

This session will provide a brief overview of customizing the taxonomy to meet accreditation requirements/standards and how to do it properly, as well as guidance on database maintenance. Specifically, it will address the importance of analyzing and pruning your database on an ongoing basis to ensure Database Curators are assigning resources to the correct level taxonomy codes, inactivating taxonomy codes no longer assigned to resources, determining why a taxonomy code is not getting many referrals and what to do about it, and then inactivating programs.

Understanding and Navigating VA Healthcare and Benefits

Kelli Maxon, Health Benefits Advisor, Enrollment & Eligibility for VA Healthcare, Battle Creek VA Medical Center; Kristy Cobb, Benefits Supervisor, Battle Creek VA Medical Center

The purpose of this presentation would be to inform the public of how veterans can enroll in VA healthcare, and what the eligibility guidelines are. It will also provide details on the differences between the veterans benefits administration and the veterans healthcare administration. This presentation will include both VA healthcare and VA benefits information and how to go about applying and receiving those benefits.

Understand Military Culture: A Panel Presentation

Donna Engeman, Army; Houston TX; Rick Iglesias, Employment & Relocation Program Manager, Army, Houston TX; Rick Butler, Marine for Life Section Head, HQ Marine Corps, Quantico VA; Chris Eiland, Supervisory Integrated Prevention Chief, Air Force, Houston County, GA

With more than 18 million veterans across the United States, increasing your knowledge of military culture will help you better understand and support the needs of your Veterans. This session is designed for frontline I&R staff across all skill levels who provide programs and services to veterans. Participants will learn about the complexities of military life, the challenges of reintegration and the impact of deployments. Presenters are from the Army, the Marine Corps, and the Air Force.

What is Trauma, Really?

Sherrard Crespo, LCSW; Director of Outreach & Prevent Child Abuse Louisiana (PCAL); VIA LINK; Covington/LA/USA

When working in a contact center or help giving profession it is extremely likely that you will encounter those who have been through traumatic experiences. It is our duty to help individuals, while practicing due diligence to not risk re-traumatization. This presentation will define in clear terms what a traumatic event is, how that affects our brain, and how we can display support and empathy without risking re-traumatization.

When The Dam Breaks

Michael Martin, CRS, CRS-DC Director of 211, 988 and Florida Veterans Crisis Line, United Way of West Florida - Pensacola, FL; Joshua Pedersen, Senior Director, United Way Worldwide - Alexandria, VA; Jennie Pollak, LMSW, CRS, CRS-DC, Executive Director, Michigan 211, Lansing, MI; Chad Veaser, MPA, PEM Emergency Management Officer, Michigan 211, Lansing, MI

"Be Prepared" is a concept and model almost all Information and Referrals embrace. It is incumbent upon us to anticipate the needs of our community and to prepare for disasters in advance; but what about when the unimaginable happens? Most could not or would not predict the impact of the COVID-19 pandemic, or a seemingly "ordinary" hurricane exploding to a Category 5 storm wiping out an entire community infrastructure, or the 2020 California fires that destroyed almost 11,000 buildings and caused \$12.1 billion dollars in damage. The dam can break and when it does it will happen when we least expect it, in a manner we didn't anticipate or when we are the least prepared. This presentation will discuss and examine some activities that can be done in advance to anticipate tremendous fluctuations in operations management when the dam breaks.

SYMPOSIUMS | Thursday, May 23rd | 9:00AM - 12:00PM EST

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

SYMPOSIUM #1 | The 211 Ecosystem in I&R

211s Role in Transforming Crisis Response: A Cross-Canadian Experience

Robyn Romano, CEO, Calgary Alberta Canada; Sarah Vardy, Special Projects Manager, Calgary, Alberta Canada; Angela Finateri, Director of Community and Organizational Impact, FindHelp211, Toronto, Ontario, Canada

This presentation will focus on the concrete steps of relationship-building, program development and evolution of social diversion programming across time in the Canadian context, using the city of Calgary, Alberta, and Toronto Ontario as case studies. Working as partners across police, 911 and community agencies, this presentation will outline how 211 can play a pivotal role in social change through providing resources and connections rather than police intervention and modeling an alternative vision for crisis response. This presentation will also outline the steps of developing and operationalizing co-location, co-response, and dispatch models with partners across systems, and how the role of I&R Specialists can change as needs arise.

Support for ALICE: The Creation of a Community Program

Chiara Cameron-Wood, Executive Director, 211 Northeast Michigan, Midland, Michigan; Will Wright, Connections Manager, Midland, Michigan; Shirley Fulco, Database Manager, Bay City, Michigan

Amid the pandemic, 211 Northeast Michigan began a partnership with a local United Way and other community organizations to create an ALICE-specific support program (called LIFT). Leveraging existing relationships and community funds, they have already been able to assist nearly 1000 people with hundreds of thousands of dollars worth of help for rent assistance, home repair, car repair, medical, dental, and more. The team from 211 NEMI will share how things got started, and lessons learned. and provide a basic blueprint for beginning a similar project in your own community.

211 Isn't Just a Phone Number – It's A Strategy for the Future

Heather Black, Vice President 211 System Strategy, United Way Worldwide, Alexandria VA; Dr. Nicole Cooper, Executive Vice President and Chief Strategy Officer, United Way Worldwide, Alexandria VA

211 is human-centered human service – not just a dialing code. This workshop will explore how 211s are evolving or should be evolving in the service delivery ecosystem. Attendees will also hear updates on the UWW commitment to the 211 strategy long term.

SYMPOSIUM #2 | Leveling Up Leadership

Core Values and Culture – Creating a Competitive Advantage

Paige Riopelle, Founder, Yellow Door, Stuart FL

Every organization or group has a culture. For good or bad. But without intention and guiding principles, even good cultures can easily fall off track. The best guiding principles for intentional, sustainable, great cultures are core values. The purpose of the presentation is to explain the why and how of culture and core value development. The session will illustrate the importance of developing core values and culture within an organization with intention. The presentation will also look at how strong core values and culture can attract and retain talent, create a strong differential from competitors, and help the organization focus on what it does best. I will demonstrate how to develop and maintain core values.

Getting "On Board" with Great Governance

Katie Appold, Executive Director, Inform USA; Joshua Pedersen, Senior Director, United Way Worldwide

A clear understanding of how nonprofit governance works can create stronger leadership, great board/team relationships and ultimately, a successful organization. In this session, we'll cover the legal structure and responsibilities of nonprofit boards as well as best practices for effective governance.

SYMPOSIUM #3 | Aging and Disability Symposium

Learn emerging trends for the Aging and Disability community. Session topics and speakers are coming soon!