Virtual Conference Sessions

November 2-3, 2023
Presented by Inform USA

Keynote Speaker

What's In a Word? The Critical Nature of DEI Language

Sonya Ware, CEO, Blue Beagle Consulting
Communities' diversity, equity, and inclusion efforts often focus on how employees and volunteers are treated within those agencies, how funding decisions are made, and efforts in speaking to consumers. These efforts should also focus on the resource databases and the language contained within them. As one of the most important features of a resource database, resource database curators should carefully select language that reflects the diversity of those who view the database online and the specialists using it to retrieve assistance for individuals in need.

Growth & Stewardship Sessions

Power & Impact of Purpose

Davin Salvagno, Founder, PurposePoint and the Purpose Summit
The Power of Purpose is Davin's most-known and widely sought-after talk, having been delivered to over 100 companies in more than a dozen countries. In this talk, Davin outlines what purpose is and what it is not, and shares fundamental principles on how both individuals and organizations can harness the power of purpose to achieve peak levels of performance and impact.

Advancing Your Mission Through Storytelling

*Jesse Ronne, Founder and CEO, Lucas Project & Best-Selling Autho*r
Whether for grants, donors, or to position your organization as a resource in your community, the ability to weave a story is priceless. Best-selling author and disability advocate Jess Ronne will share how she grew her mission's following by thousands through storytelling. She'll also share her personal story to encourage the audience that even the most trying times can be leveraged for good.

Succession Planning - Then There's Reality

Mary Cooksey, Accreditation Reviewer, Inform USA

Organizations are challenged to plan for the next eventual step in their lifespan, the succession of a key team member. This session will discuss creating and maintaining a functional, realistic succession plan. A succession plan is a foundational component of maintaining high quality operations.

Culture Matters: How to Attract and Retain 21st Century Talent

Ruthann Weeks, People and Culture Strategist, Harmony In The Workplace

This session will unpack the multi-generational workforce and what drives them, describe best practices in building organizational cultures of support, and provide strategies to unite workers toward a shared vision and common goals.

211s, CIEs and HIEs: Leveraging the Trifecta to Improve Health Equity and Community Outcomes

William York, President and CEO, 211 San Diego; Laura Young, Executive Director, San Diego Health Connect

Learn about the 211 San Diego/Community Information Exchange (CIE) and the San Diego Health Connect/Health Information Exchange (HIE) partnership. This innovative model provides a parent-subsidiary model and connects two key pillars of the community while achieving a comprehensive and whole-community approach to person-centered care coordination for social determinants of health. This session will provide insights focused on the "WHY" and "HOW" of this partnership and the results of leveraging the power of 211's to engage CIEs and HIEs to improve individual, patient, and community outcomes.

Resource Database Sessions

Accelerating Data Standards for 211s

Mary Miller, 211 Innovation, United Way Worldwide

Kelly Dodd, Vice-President, United Ways of New York State and Chief Operating Officer, 211 NYS, Inc

Andrew Benson, Founder and President, Expound Decision Systems

Does data quality keep you up at night? Do you have big opinions about eligibility data or how hours of operation are listed in your database? Are you curious about emerging data-sharing opportunities? If so, you should join our session to hear about the work happening in the 211 Data Strategy Accelerator Group. Our group brings

together experienced database curators alongside I&R leadership and technology experts to tackle the pressing issues of interoperability and standardization. The expansion of the 211 National Data Platform and emerging opportunities in data sharing have placed data consistency and quality at the forefront of our work. We'll communicate the "why" behind our accelerator group, share our progress from this year, and discuss our recommendations for the field (which are a departure from how things have been done among 211s for the past 25 years!). You'll learn what you can do now, what to expect from our group in the future, and how you can share feedback and contribute to ongoing discussions related to 211 data strategy.

Making Inclusion/Exclusion Practical
Hannah Newton, Resource Center Manager, Crisis Connections
Too often, the inclusion/exclusion document lives in a buried folder, unused and unread. Sometimes, staff think they know what is in it, so they don't need to refer to it. Other times, the concepts are general enough to get around with just a little rewording. As a result, the database becomes overfilled with deadweight and potentially harmful agencies while the critical agencies languish. Learn how to identify these agencies for removal and use Legal Status Types to connect information already in the database to your inclusion/exclusion document.

Paving the Way for Inclusive Resource Databases
Calisse Roopchand, Resource Specialist, Kids Help Phone
Nicole Giroux, Bilingual Resource Specialist, Kids Help Phone
The presentation aims to provide database curators and all individuals involved in building and maintaining resource databases with best practices and strategies for ensuring inclusivity. Some of the items discussed in this presentation include identifying and recognizing the distinction between communities and how to use target taxonomies to connect service users with the most appropriate services. Other issues include techniques for boosting community involvement, strategically searching for services, and vetting those resources of representative for inclusion in the resource database.

Taxonomy and the I&R Database Ecosystem
Theresa Palzat, Senior Operations Coordinator, Canadian Mental Health Association
How do you envision your information and referral database? Do you picture it as a directory with the key information for the thousands of calls your team answers yearly? Or do you see your database as one piece in a complex data ecosystem? Review recent projects that aligned taxonomy use across three database teams, including one team from the healthcare system. This session will combine examples

of call referrals, website searches, and ongoing data reports and discuss how these components are connected and how I&R agencies can leverage this connection to improve the full data ecosystem.

Self-Care Sessions

Deliberate Self-Care
Sherrard Crespo, LCSW, Director of Outreach & PCAL, VIA Link
Experiencing daily stress can affect our brains and can lead to burnout/vicarious trauma/compassion fatigue. Learn how intentional self-care can un-do these stress effects and instill resiliency in our brains. You will receive practical solutions for self-care and how they will build strength and resiliency in your mind and body.

Compassion Fatigue? What About Compassion Satisfaction?
John Plonski, Developer, Helping Empathetically as Responders Training (HEART)
This session will explain the dependence of self-care upon compassion fatigue, burnout, and compassion satisfaction. It will also provide an appreciation of the work, client/consumer, and personal environments on personal well-being. Finally, it will explain the Professional Quality of Life Scale (ProQOL) assessment tool for individuals and agencies to indicate areas for improvement.

Understanding the Impact of Psychological Safety to Achieve Peak Performance
Camica Credle, CEO, Credle Consulting, LLC
Bettina Mason, CEO, Mason Education
In this interactive and engaging session, we will explore the powerful impact of psychological safety on achieving peak performance in the workplace. Psychological safety is crucial in creating an environment where individuals can perform at their best, innovate, and excel. We will explore the connection between psychological safety and peak performance, including increased employee engagement, productivity, and satisfaction. By fostering psychological safety, organizations can unlock the full potential of their teams and individuals, leading to higher levels of creativity, collaboration, and problem-solving. Join us to gain insights into how psychological safety drives peak performance and discover practical strategies to cultivate a psychologically safe culture that nurtures and empowers employees to reach their highest levels of achievement.

Foundational and Practical Self-Care
Ashley Ladbury Hrichen, Operations Director, FirstLink
This presentation will cover the foundational concepts of self-care and practical techniques and strategies for staff self-care activities. The presentation will provide useful preventative strategies and techniques for managing difficult emotions before and after phone calls.

Service Delivery Sessions

Adding Empathy and Compassion Into Your Toolkit
Sandra Ray, CRS, Program Director, Inform USA
Build your connection toolkit with empathy and compassion. Both are essential for quality information and referral contacts and are required by the Inform USA Standards. You'll learn what these concepts are … and what they are not. Walk away with hands-on tools to help you increase your skills for your next contact.

Co-occurring Risks Require Interconnected Networks
Jaime Costello, Director of Programs, National Council on Problem Gambling
Sushmita Upadhaya, Program Administrator, National Council on Problem Gambling
Amanda Quintana, Program Manager, National Council on Problem Gambling
Often, the factors that contribute to developing mental health crises are interrelated. Why aren't our support networks better integrated? In this workshop, we'll use the issues of problem gambling and suicide to explore the interconnectedness of various mental health concerns and the importance of strengthening the connections within support networks. Research has shown that many individuals struggling with problem gambling have attempted suicide, while many others have contemplated suicide. Individuals and families affected by problem gambling also report other mental health concerns, including depression, anxiety, interpersonal violence, addiction, and trauma.

Follow-Ups: What Are We Doing and Are We Getting This Right?
Faed Hendry, Accreditation Reviewer, Inform USA
This interactive session will use polls to demonstrate the variances in the follow-up landscape, identify different follow-up models, and identify strategies for mitigating some of the challenges of conducting follow-up and balancing the allocation of staffing resources while maintaining service levels. The session will also discuss strategies for evaluating and measuring the quality of I&R follow-up programs.

Say What?! How to Communicate Anything to Anyone
Dr. Kathy Gruver, Professional Speaker, Author, and Coach
Communication is key. But what happens when the people communicating are speaking different languages? Learn what type of communicator you are and how to reach across that divide to influence others who communicate differently. Combining communication skills, NLP (Neuro Linguistic Programming), improvisation, and psychology will imbue the audience with new skills and understanding to ensure their message is heard, effective, and productive. Whether between coworkers, team members, bosses, or in front of an audience, this workshop will improve your game and allow you to accomplish more without misunderstanding and confusion. This presentation is for anyone who wants to learn more about communication style, conscious communication, thinking on their feet, direct and inferred communication, and how to get what you want with different personality types.

The Basics of Inform USA Certifications
Sarah Pottelberg, Certification and Data Analytics Director, Inform USA
Matthew Hundley, Certification Director, Inform USA
Are you debating whether certification is right for you or your agency? Do you have questions about how to apply or how to study for a certification exam? Join the Inform USA certification experts in this informative session about certifications.

What Color are Your Socks? Asking Demographics and Feeling OK About It
Lacey Hanson, GetCare and Program Technical Specialist, Multnomah County, Aging, Disability and Veteran Services
Ciara Doyle, Chief Operating Officer, 211info
Nickolynn Nixon, Community Information Specialist, 211info
This joint presentation of 211 and ADRC of Oregon will cover why demographic data is collected, tools for asking the questions, and how the information is used to improve the agency and the community. Participants will hear from a community resource specialist, a call center manager, and a data analyst about all things "demo" and learn some tools to improve the process for staff and the agency.

Technology Sessions

Unlock the Future of Contact Centers with AI: The Game-Changing Potential of Chat-GPT & AI Technologies

Nathan Hart, Senior Director of Technology, Solutioning and Data Analytics, The Northridge Group

Embrace the transformative power of Artificial Intelligence (AI) technologies, such as Chat-GPT, to revolutionize your contact center and redefine the industry. Its potential to improve the customer experience (CX) by automating certain interactions and requests, such as 24/7 service, staffing shortages and multilingual communications—and all with reduced labor and expense—is nothing short of groundbreaking. However, before contact center agents can fully entrust AI with these tasks, a myriad of challenges and variables must be addressed and conquered. Crisis mitigation takes precedence over expediency and expense. In this captivating presentation, Nathan Hart will unveil the immense advantages of AI technologies in contact centers, as well as how to prepare for some of the darker sides yet to reveal themselves to the world—and your customers.

Everything You Need to Become a Dashboard Ninja and Share and Monetize I&R Data

Andrew Holbein, Director of Resources and Data, VIA Link
LaVondra Dobbs, CEO, VIA Link

Creating dashboards is a powerful way to share I&R data with your community and a great skill set for staff to develop. Learn all about creating dashboards, connecting them to 211 data, and selecting the right software. We will also explore dynamic examples of I&R dashboards and how to monetize these tools for your agency.

Specialized Information and Referral

"Our Commitment Never Waivers:" American Red Cross Services to the Armed Forces

Dr. Andrea Szkil, Program Manager for Service to the Armed Forces Partnerships, American Red Cross
Becky LaPolice, Casework Program Manager, American Red Cross

This presentation will provide an overview of how the American Red Cross supports military members, veterans, caregivers, and their families through its Service to the Armed Forces program. In doing so, it will address the unique needs of the military/veteran community and how the Red Cross engages with community partners.

United States Space Force: Holistic Health, Total Force Fitness and Engaging the Resource Community

Mark Munger, Holistic Health Integrator, United States Space Force

Many resources are utilized to keep the members of the Armed Forces of the United States and their families in a readiness stance with a focus on the future. One important aspect is keeping community resources available to those members serving away from their installations. Not only is it important for resource agencies to know how they can assist, but potentially more important is the service member knowing there is assistance available. The presentation will discuss how consistent services are provided across military installations, and how financial readiness training for Space Force guardians compares with other service branches.

Veterans Justice Outreach and Reentry Programs: How the VA Helps Justice-Involved Veterans

Matt Miller, Justice Outreach Specialist, Veterans Administration

Veterans with police involvement, criminal charges, or incarceration often struggle to navigate traditional justice systems and obtain positive outcomes. The Veterans Administration has two programs that partner with justice systems to improve outcomes for those veterans and their communities. This workshop describes those programs' missions, methods, and partnerships. Learn how and when these programs can help and how to refer veterans to them in their communities.

The Future is Old; Addressing Ageism for Better Client Interactions & a Brighter Outlook

Jenna Wickens, Certified Professional Consultant on Aging, MatureMinds Coordinator, Catholic Family Services of Simcoe County

Words are powerful, and language allows connection, community, and meaning-making, but what does it tell us when "Old" is consistently associated with negativity? Are older adults less valuable, unable to make meaning, and unable to connect? What is "old" anyway? The answers to these questions are complex and rooted in North America's systemic ageist beliefs. We must garner a greater understanding of ageism and its effects on employment, health care, volunteerism, and life in general for a better future.

We Serve Everyone: Expanding Demographic Collection and Enhancing Your Marketing

Zachary Trammel, Program Manager, USAging
Joellen Leavelle, Director, Communications, USAging

The Eldercare Locator and the Disability Information Access Line have worked to expand our demographic data collection over the last year. Our goal was to better understand the diverse population we serve across the United States and to identify outreach opportunities. This session will explore where we started, where we are, and where we hope to go in the future with our demographic data and marketing.