THE RIPPLE EFFECT

Inform USA **Virtual Gathering** 2025

11.13 - 11.14.25 **VIRTUAL**

Session Listing
(alphabetical)

Keynote: Keeping the Flame Lit: How to Reignite Learning & Growth in Tough Times, *Heather Burright*

When funding is tight and change feels constant, it’s easy for learning and professional growth to take a back seat. This session is your spark. It's a chance to reconnect with what’s possible, even in hard seasons. You’ll walk away with practical, low-cost ways to keep learning alive, fuel your team’s momentum, and stay lit from within.

211HSIS Taxonomy 101 Super Skills Academy, *Nichole Bonilla, Jennifer Palmer, Shirley Fulco*

This introductory presentation is targeted at beginner-level users of the 211HSIS taxonomy and those not currently using the tool but interested in learning more. It will provide a tour of what a taxonomy is, how its structure is more than just a collection of keywords, and important strategies and practices to "boost" your skills to superhero levels.

- Identify the structure of the 211HSIS taxonomy and the purpose of the hierarchy
- Describe all taxonomy elements and their purpose
- Demonstrate how the 211HSIS website can support database tasks

AI Roundtable, speakers TBD

Join leaders across the Information and Referral space to hear their experiences planning and implementing artificial intelligence (AI) in their workflow. You’ll hear positive experiences, the things that didn’t work, as well as things they wish they had done differently.

Assisting I&A Professionals to Identify and Empower Neurodivergent Individuals, *Keri Nopens*

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 utilizing tools with neurodivergent individuals to achieve positive outcomes, including effective communication, sensory accommodations, respecting boundaries that may be unfamiliar, and combating judgment with education.

CityServeX and a New Day Dawning, *Vickie Martin*

This session will showcase CityServeX's innovative Resource Coordination model, providing attendees with insights into transformative community initiatives happening across the nation and exploring why Resource Coordination has become essential for effective community impact. Participants will learn about the creative funding and implementation of various navigation models, and explore the potential implications for the future expansion of the Information & Referral field. Through the power of compelling stories, strategic relationships, innovative tools, and renewed hope, this session demonstrates how collaborative approaches are fundamentally reshaping the way communities connect people to vital resources and services.

- Explain the core principles and strategic importance of CityServeX's Resource Coordination model and how it is influencing the I & R field.
- Compare various navigation models, the benefits of each approach, and identify the common thread that drives impact.
- Describe how the integration of story, relationships, tools, and hope creates sustainable partnerships that enhance community resource coordination and drive measurable outcomes.

Defining 211 Data Structure and Style to Support Data Sharing, *Mary Miller, Polly McDaniel*

The 211 Data Structure and Style Accelerator Group was formed to refine existing guidance for resource data elements, structure, and style, ensuring they meet the needs of 211 referral provision and making 211 resource data more accessible for external data sharing. Members began with the Inform USA data curation standards and HSDS data structure, focusing on defining a single data structure with consistent definitions for human services data as it applies to the 211 industry across the United States. During this session, the group will share the results of their work thus far, inviting feedback to influence the final publication of the National Standards for 211 Data Structure and Style.

Primary learning objectives of the session are:

- Expanded knowledge of best practices for data curation of information and referral service directories
- Considerations for data sharing with the aim of creating a unified system across multiple data curation partners

- Improved understanding of standards relating to recommended and mandatory data elements
- Gain an understanding of the purpose and use of each data element in a 211 service directory

Dementia Discussions: Navigating Cultural Differences in Dementia Care, *Jenna Turner*

This presentation explores the global and cultural perspectives on dementia, highlighting how different societies perceive, manage, and provide care for individuals with the condition. It examines dementia's impact on various cultural groups, including African American, Latino, Native American, Asian American, and White American communities within the U.S. The discussion also addresses challenges such as stigma, caregiver burden, healthcare access, and financial barriers.

By the end of this presentation, participants will be able to:

- Identify how cultural factors influence dementia perception, diagnosis, and care across diverse communities.
- Recognize specific healthcare disparities and barriers affecting dementia care in various cultural groups.
- Apply culturally appropriate assessment and communication strategies when working with people living with dementia and their families.
- Integrate traditional cultural practices and beliefs into modern dementia care approaches.

Dread Them No More: Working with Challenging Calls, *Julie Nurmi, Dgar, Fjell*

Working with challenging calls can be one of the most difficult tasks required of us as Community Resource Specialists. The reasons a call may be challenging can vary; as such, different approaches and techniques will be more or less effective depending on the type of caller. In this workshop, we will discuss various categories of challenging calls, discuss approaches to tackling the challenges presented, and role-play several scenarios.

- Different reasons calls may present as challenging
- Various categories of challenging calls
- Techniques to de-escalate whenever possible
- Working with racist or abusive callers
- When it's time to let a caller go, and how to do so
- Opportunity for the audience to participate in a roleplay scenario

Guardians of the Taxonomy! Superhero Strategies in Action with 211HSIS Taxonomy Customization & Targets, *Nichole Bonilla, Jennifer Palmer, Shirley Fulco*

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 providing examples of how to make informed indexing decisions.

How to Prepare for the Inform USA Accreditation Database Review Phase, *Sarah Pottelberg*

This session will provide an overview of the entire Accreditation Database Review Phase process. It will identify its place in the overall timeline of the accreditation process, outline the steps involved, provide guidance on where to find the best information for preparation, and offer tips on what reviewers are looking for. It will also highlight changes to the requirements resulting from the release of the new Standards. A Q&A period will close the session.

Participants will leave this session with the ability to:

- Describe the steps of the Database Review Phase
- Identify the best resources available to prepare
- Identify areas of possible focus in their own database
- List the ways they can prepare for a database review

Managing the Maze: Leveraging Cross-Functional Collaboration to Navigate Accreditation & Funder Requirements, *Kaley Newby, Abby Torre, Cheryl Stewart, Tijee Williams*

This session offers a practical guide for I&R professionals responsible for meeting standards across multiple accrediting bodies and funders. Attendees will learn how to streamline compliance efforts by mapping overlapping requirements, forming cross-functional teams, and embedding project management principles into everyday operations. Real-life examples and templates will be shared, including tools for tracking deliverables, engaging staff across departments, and aligning compliance with organizational strategy. The presentation is grounded in lived experience, having navigated over 60 funding contracts and three accrediting entities in a 24/7 contact center.

- Identify common overlaps among accrediting body and funder requirements.
- Describe the role of cross-functional teams in managing compliance projects.
- List tools used to track and align deliverables across departments.
- Explain how project management frameworks can streamline readiness efforts. Compare different engagement strategies to build buy-in from staff at all levels.

Money Matters: Benefits Programs for Low-Income Medicare Beneficiaries, *Kristin Helfer-Koester, Jennifer Teague*

Due to rising out-of-pocket costs, low-income Medicare beneficiaries may delay or forgo necessary healthcare, prescription medication, or groceries. This session will share information and resources on programs that can save an individual thousands of dollars annually on healthcare and prescription drug costs, while also providing information on how individuals can maximize their monthly income. Presenters will discuss tools and resources that I&R/A professionals can use to learn about or strengthen their knowledge of these programs and help identify and assist clients who may be eligible for benefits. Attendees will learn about the Medicare Savings Programs (MSPs), the Low-Income Subsidy Program (LIS or Extra Help), and the federal legislation that authorizes grants to states and tribes for outreach and assistance related to these programs. NCOA and ADvancing States staff will share tools and resources I&R/A professionals can use, including:

- An online Benefits Participation Map that identifies the enrollment gap for MSPs, Supplemental Security Income (SSI), and the Supplemental Nutrition Assistance Program (SNAP).
- NCOA's BenefitsCheckUp®, a free online tool that connects older adults and people with disabilities with nearly 2,000 benefits programs to help them pay for food, medicine, utilities, and other daily expenses.
- Benefits Enrollment Centers, which help low-income Medicare beneficiaries enroll in these money-saving programs.
- Information from a recent survey and issue briefs on aging network initiatives to connect individuals with benefits, as well as MIPPA resources emphasizing outreach tools and training.

The Proof is in the Pudding: Understanding the Importance of Data Collection and Beyond, *Lexie Bartunek*

Collecting data is central to understanding the communities we serve and measuring the impact and effectiveness of our programs. Increasingly, ADRC/AAA front-line staff are being asked to do more work with fewer resources while still providing high-quality support to callers in their community. Due to this increasing workload, one aspect that is often overlooked is data collection. In our current environment, data collection is more important than ever to accurately reflect the actual impacts of the work we are doing. While those of us in the field truly value the quality over quantity, those in leadership often rely more on the numbers to support funding and program growth. This session will examine the current federal data requirements for ADRCs/AAAs, specifically those mandated by the Older Americans Act Support Programs, as well as some state requirements and best practices to support ADRC staff in completing the necessary tracking while still serving their communities.

Participants should leave the session being able to:

- Identify both data collection requirements and the reasons behind them for ADRC work.
- Develop opportunities to bridge the understanding of data collection and usage between direct line staff and agency leaders.
- Discuss own processes and share best practices with peers.

Think, Do, Engage, *Katelyn Herrygers*

Through storytelling, strategy, and real-world tools, Katelyn equips people to navigate complex systems, communicate effectively, and take action in ways that create lasting, positive change. Learn how to reflect on how we naturally process experiences — whether it's parenting, advocacy, or work — by breaking down experiences into a new model:

Think, Do, Engage.

1. Think — Pause, reflect, and shift perspective.
2. Do — Take action, even in small ways.
3. Engage — Become part of the bigger picture and make an impact.

The session offers a look at a practice with tangible takeaways of turning frustration into forward momentum. It's about choosing curiosity over judgment, action over apathy, and collaboration over isolation — in workplaces, in parenting, in schools, and in the world around us.

Using Unmet Needs Data to Increase Resource Curation, *Kevin Evans, Shari Bowers-Dueker*

We will discuss the ways that we have improved our unmet needs data over the last year. We will engage the audience in how we have integrated community engagement with resource curation. We will also display our dashboards, which we use to track our resources.

- Attendees will leave with a clear understanding of the Indiana 211 strategy for Community Engagement and Resource Curation.
- Attendees will leave understanding how the use of dashboards can impact overdue rates.
- Attendees will leave understanding other strategies that have improved Indiana 211 overdue rates.

What You Need to Know about Kinship Navigation and Information & Referral to Support Kinship/Grandfamilies, *Leland Kiang, Ana Beltran*

Nationwide, grandparents, other relatives and close family friends are raising over 2.4 million children, whose parents are unavailable due to various reasons, including death, military deployment, and substance use. While research shows that both kin caregivers and children benefit from being in kinship/grandfamilies, studies also indicate that these families are disproportionally impacted by financial instability, disability, and trauma and that the well-being of all family members improves when they receive appropriate services. Kinship Navigators (a specialized I&R program) helps kinship families or grandfamilies (as these families are sometimes called) find and connect to local service providers that can help. Session attendees will learn about who kinship/grandfamilies are, their strengths and needs, how kinship navigators help, how other I&R programs can start supporting kinship/grandfamilies, and no-cost resources for professionals from the Grandfamilies & Kinship Support Network: A National Technical Assistance Center.

- Attendees will be able to define who kinship/grandfamilies are.

- Attendees will be able to identify at least one strength and one need of kinship/grandfamilies.
- Attendees will be able to describe how kinship navigators help kinship/grandfamilies.
- Attendees will be able to identify at least one resource that can help them develop or expand their own support of kinship/grandfamilies.

Working with Emotions on Information and Referral Calls, *Yusra Batool*

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