



## **Grand Gathering – Virtual Edition**

August 8 – 9, 2024 – 11:00 am – 4:00 pm EST

### **Keynote: Innovation for Social Change**

- *Leah Kral, Author, Facilitator, Senior Director of Strategy and Innovation  
George Mason University*

We can thank philanthropy and nonprofits for breakthroughs like hospice care, public libraries, and the discovery of insulin to treat diabetes. Yet finding solutions to social problems and measuring impact are often very difficult. We care deeply about those we serve, but good intentions don't automatically translate to impact. Why do some nonprofits punch above their weight while others misfire?

The most successful nonprofits are innovative, which is, in short, about finding new, surprising ways to get results and value. It involves creativity, originality, and some risk-taking. It involves building innovative practices into our workplace DNA, such as pilots and small experiments. Through stories of social entrepreneurs and nonprofit powerhouses like Mayo Clinic, the American civil rights movement, Fred Rogers' nonprofit production company, Rhinos Without Borders, and many others, there are practical lessons that can be applied at any nonprofit. At the same time, we won't shy away from cautionary tales of what not to do.

## **Breakout Sessions:**

### **211 as a Community Utility**

- *Richard LaPratt, 211 Metro Chicago*
- *Robert Bradford, Bradford Business Solutions, LLC*
- *Gabriel Garcia, 211 Metro Chicago*
- *Hai-Chau Carroll, 211 Metro Chicago*
- *Ian James, 211 Metro Chicago*
- *Connor Bennett, United Way of Metro Chicago*

211 Metro Chicago was built by its community to be 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 has provided a road map for success with fund development, technology, and innovation, as well as hiring and management practices that can exceed excellence across all quality metrics and established controls.

### **Aging and Disability Partnership Strategies to Improve Transportation Options and Services**

- *Katherine Newman, Easter Seals/National Aging & Disability Transportation Center*
- *Zachary Trammel, USAging*
- *Rochelle Cotey, Michigan Transportation Connection*

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 to meet 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.

## **Assessment vs. Conversation: The Importance of Active Listening Skills for Responding to Suicide**

- *Sherrard Crespo, Via Link*

Any I&R contact can develop into a crisis call. All professionals and volunteers in the helping field must 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 active listening tools 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 respond to suicide ideation and risk properly.

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

- *Todd Jordan, United Way of Greater Kansas City*
- *Brian Shapley, United Way of Greater Kansas City*
- *Kristen Engelbrecht, United Way of Greater Kansas City*

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

## **Building Community Trust Through Transparent Data Practices**

- *Katherine Delgado, The American Association of Suicidology*

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 comply with regulations and reflect 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?!?**

- *Evelyn Mercer, United Way of Jackson County (Central Michigan 2-1-1)*
- *Sharon Lijewski, Everyday Life Consulting*

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 their positive impact on their clients. But how are CHWs beneficial to the information and referral sector? In this session, you will learn what CHWs are, 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.

### **Collecting and Applying Inclusive Data - Allowing for Equitable Access to Navigation Services**

- *Nicole Abruscato, Services and Housing in the Province (SHIP)*
- *Shereen Rampersad, Services and Housing in the Province (SHIP)*

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

## **Disaster: When the Dam Breaks**

- *Michael Martin, United Way of West Florida*

“Be Prepared” is a concept and model that almost all information and referrals embrace. We must anticipate our community's needs and 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, a seemingly “ordinary” hurricane exploding into 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.

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

- *Lacey Hanson, Multnomah County, Aging, Disability and Veteran Services*

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 providing 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.

## **Identifying and Supporting Unpaid Family Caregivers**

- *Lexie Bartunek, Washington State DSHS/HCS-State Unit on Aging*

Many people who call Information and Referral do not identify themselves as caregivers for a variety of reasons. This session will discuss some reasons for this and 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.

### **Not Just an Inform USA Standard: Program Evaluation and Quality Assurance**

- *Bob McKown, Inform USA Accreditation Reviewer*

This session aims to provide an overview of program evaluation for I&R services. It will answer questions frequently asked by those in the accreditation process, such as: 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.

### **Opportunities and Risks of Using Artificial Intelligence (AI) in your I&R**

- *Greg Bloom, Open Referral*

By popular demand, this session will explore the risks and opportunities posed by Artificial Intelligence technologies for Information and Referral providers and their communities. We will consider the nature of these technologies – their strengths and limitations, and a range of experiences with their deployment to date. Participants will be prompted to practice a risk analysis to consider the potential harms and benefits of given use cases.

### **Spring = Time for Clean-Up: Pruning Taxonomy Codes and Resources from Your Database ( Room 1 )**

- *Kristen Fogerty, Greater Twin Cities United Way*
- *Nichole Bonilla, 211 LA*

This session will provide a brief overview of customizing the taxonomy to meet accreditation requirements/standards, how to do it properly, and 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,

### **Understanding Military Culture**

- *Donna Engman, US Army*

- *Ron Dunn, US Air Force*

With more than 18 million veterans across the United States, increasing your knowledge of military culture will help you better understand and support their needs. 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.

### **What is Trauma, Really?**

- *Sherrard Crespo, Via Link*

When working in a contact center or help-giving profession, you will likely encounter those who have been through traumatic experiences. It is our duty to help individuals while practicing due diligence to avoid 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.

### **Sponsored Sessions:**

Here's your time to hear from the product experts and ask them any questions you have about how their products/services may benefit your agency.

#### **Sensez9**

Sensez9 helps human and health services referral agencies manage screening and appointment scheduling. We also provide access to up-to-date resources for real-time challenges, such as disasters or violence. Sensez9 web and mobile apps enable agencies to streamline operations and community members to self-serve their needs. This virtual presentation will showcase Sensez9 products and their easy-to-use interfaces that benefit organizations and their end clients.

#### **Connect 211 - Making Resource Data Easy To Use**

211 resource data is technical and confusing for public users and partners. The schema doesn't always make sense, there are terms they don't know and don't even get me started on the taxonomies. In this presentation, we'll share

tips and tricks learned while deploying 211-centric, user-friendly solutions for 30+ organizations around the country.

## **yanzio**

Recent advances in AI are stunning the world with their capabilities. Join Neil McKechnie, the founder and former owner of iCarol, as he describes specific ways that any I&R can thoughtfully apply AI to their work and benefit their help seekers, data partners, and co-workers. His new company, Yanzio, is already producing results for numerous I&R organizations across the US and Canada.

## **Language Line - “¡AY CARAMBA!” Understanding Language and Cultural Barriers on I&R Calls**

This interactive presentation provides insights from veteran telephone interpreters representing 46 languages about the most common language and cultural issues encountered on stressful calls. It highlights language and cultural complexities encountered in communicating with non-English-speaking callers and offers strategies to overcome them. Along the way, the presentation provides essential tips for working more effectively with telephone interpreters.

## **Focus Discussions:**

### **Deep Dive: What is Trauma, Really?**

- Sherrard Crespo, [Via Link](#)

Sherrard has agreed to facilitate a conversation about what trauma may mean in the context of your I&R program and how leadership can help with the principles she discusses on Day 1. Come prepared with your questions and comments to share with others!

### **Deep Dive: Opportunities and Risks of Using AI**

- *Greg Bloom, Open Referral*
- *Neil McKechnie, yanzio*

Greg and Neil have agreed to facilitate a conversation about how your I&R is currently using AI, any plans you may already have, or questions about the next steps. Be prepared to discuss any issues that leadership has posed, staff



concerns, or anything else that comes to mind on this important topic. AI is “here to stay,” so how can your I&R move forward responsibly?

### **Deep Dive into Certification: Ask the Experts!**

- *Sarah Pottelberg, Inform USA*
- *Matthew Hundley, Inform USA*

Matthew Hundley and Sarah Pottelberg will be available to answer questions about the Certification process. Ask about eligibility, application, studying, and recertification! This session is for any question you have about certification and weren't sure who you could ask.

### **BONUS Content:**

#### **Why Most DEI Initiatives Fail: It's NOT Great Intentions or The Beautiful Room (Prerecorded session available to attendees)**

- Skot Welch, Global Bridgebuilders

Have you noticed that most diversity, equity, and inclusion (DEI) programs don't last? What's missing, and how can that be fixed? In this engaging talk, Global Bridgebuilders, Founder Skot Welch, will provide know-how and practical insights from his over 25 years of experience working with organizations worldwide. One trait separates the good from the great, the leaders from the followers. And most organizations, although well-intentioned, are getting it wrong.