Session Contents

A Day in the Life of a Workplace Resource Specialist: Navigating Human Needs, Workplace Realities, and Community Resources

Aging and Disability - Building Strong Aging & Disability Partnerships: Advancing No Wrong Door Through Community Navigation

Be the Bridge: Why We Don't Need More Resources. We Need More Trust.

Beyond the Behavior: Understanding and Responding to Difficult Dementia Conversations

Beyond the Resource Database: Transforming Community Navigation Outreach through Trust, Cohesive Branding, and Active Collaboration

Bridging the Gap: Connecting Across Generations in Crisis and Community Work

Building Sustainability: How the Right Partnerships Can Strengthen Community Navigation Work

Designing Strategies for Sustainable Resource Data Infrastructure

Ethics and Decision-Making about Artificial Intelligence

Introducing … the Accreditation First-Time Toolkit

[A Person-Centered Approach to Community Navigation]

[Stronger Together: Creating Community Partnerships That Improve Database Quality]

[Suicide and Substance Misuse: What is the Connection?]

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

[Taxonomy Training for Taxonomy Trainers: Engaging Exercises and Meaningful Metrics]

[Trauma Navigation in Community Navigation]

[When the Call Is More Than a Call: Supporting Vulnerable Callers While Building Resilient Community Resource Specialists]

[Working the Why: Aligning Organization Mission and Operations to Create Meaningful Outcomes]

Session Listing

A Day in the Life of a Workplace Resource Specialist: Navigating Human Needs, Workplace Realities, and Community Resources

Connie Beal, Working Bridges at United Way of Vermont

By the end of this session, participants will be able to: Describe how workplace-based resource navigation differs from traditional community-based service delivery models. Identify the core skills and competencies needed to effectively support employees within workplace settings. Examine confidentiality considerations and ethical challenges that arise when navigating relationships between employees, employers, and community resources. Apply practical communication strategies for difficult conversations, including delivering hard news with empathy and professionalism. Recognize approaches for managing emotional labor, maintaining boundaries, and supporting personal resilience in helping professions. Explore how business-community partnerships can be a sustainable, effective way to expand access to resources and support community well-being.

Aging and Disability - Building Strong Aging & Disability Partnerships: Advancing No Wrong Door Through Community Navigation

Christina Bowen, Christina Neill Bowen Consulting, LLC; other speakers TBA
Partnerships between disability, aging, and community navigation organizations are critical to creating a No Wrong Door System that serves all populations in need of long-term services and supports, including older adults, people with all types of disabilities, their families and caregivers. A "No Wrong Door" approach to partnerships between aging, disability, and community navigation organizations creates efficiencies that empower individuals to make informed decisions, exercise greater control over the resources available to them, and achieve their personal goals. This session will explore strategies that states use to strengthen these partnerships and the resulting benefits for the organizations involved, community navigation professionals, and the people served.

Be the Bridge: Why We Don't N*eed More Resources. We Need More Trust.*

Cynthia "Muffy" Levy-Mendoza, Brown Mamas Keeper; Tamera Dixon, Brown Mamas Keeper
This session brings community navigators into direct conversation with the lived experiences of the people and families they are working to support. Led by Muffy Mendoza, founder of Brown Mamas, alongside members of her team and the Brown Mamas community, the presentation will explore what it feels like to be on the receiving end of referrals while navigating crisis, caregiving, resource scarcity, and institutional distrust. Presenters will share what community members often need beyond a phone number or resource list: trust, follow-through, emotional steadiness, cultural understanding, and support that can feel closer to coaching than traditional navigation. Attendees will leave with a deeper understanding of how survival mode shapes communication, decision-making, and follow-through, and how care navigators can build referral practices rooted in dignity, trust, and real-life context.

Beyond the Behavior: Understanding and Responding to Difficult Dementia Conversations

Kate Madl, Alzheimer's Association

When caregivers reach out for help, they're often feeling overwhelmed, frustrated, and unsure how to respond to behaviors they're seeing in a person living with dementia. Questions about agitation, repetition, resistance to care, wandering, or confusion can quickly turn into difficult and emotional conversations. This session will share practical strategies for supporting caregivers through these challenging moments. Drawing on experiences from the Alzheimer's Association 24/7 Helpline, participants will learn how to look beyond the behavior and help caregivers identify the needs, emotions, and circumstances that may be contributing to it. Through real-world examples and discussion, attendees will explore techniques for active listening, validating caregiver feelings, reframing challenging situations, and guiding caregivers toward realistic, person-centered approaches. Participants will leave with practical communication tools they can use immediately to navigate difficult conversations, build caregiver confidence, and help families feel heard, supported, and empowered.

Beyond the Resource Database: Transforming Community Navigation Outreach through Trust, Cohesive Branding, and Active Collaboration

Nickie Thornton, 211Info

For I&R (Community Navigation) professionals, a resource database is only as strong as the trust and communication we build with the community partners who help us curate it. This interactive session addresses the potential challenges of low public awareness and partner skepticism through an active and intentional outreach program in the community. Through three core pillars: consistent agency branding, empowering staff into confident agency advocates through speaking, and hosting Community Partner Roundtables; we will share proven strategies to elevate your agency's statewide or regional profile. Attendees will participate in a simulated "Speed Roundtable" discussion activity to help shape a first-of-its-kind national

directory of "Community Navigation Outreach Programs across the USA" to foster year-round networking and resource-sharing.

Bridging the Gap: Connecting Across Generations in Crisis and Community Work

Kristin Ankrom, Fairfield County 211, Crisis Program Manager / Navigate Consulting, LLC, Trainer & Consultant

This session explores how generational experiences shape communication styles, workplace expectations, and help-seeking behaviors, particularly within human services and crisis response environments. Participants will examine key characteristics of each generation and learn how these differences influence engagement, trust, and collaboration. Drawing from real-world examples and data, the session highlights practical strategies for adapting communication, strengthening relationships, and reducing misunderstandings. Attendees will leave with actionable tools to create more inclusive, responsive, and effective interactions across generations.

Building Sustainability: How the Right Partnerships Can Strengthen Community Navigation Work

Margaret Telsch-Williams, Council of Community Services - 211 Virginia

Partnerships shouldn't be hard, but picking the right partners to pair with your Community Navigation program takes precision. This session will focus on 211 Virginia and United Way of Rhode Island's visions of growing and specializing 211 services to meet the needs of their state's populations while expanding funding models, partnerships, and visibility to drive program sustainability. Explore what good partnerships look like and hear how they benefit the 211s taking them on, while learning about and sharing what is being done in the network to support 211 operations in reliable, scalable, and resilient ways. This session aims to support program expansion for 211 call centers, databases, and their data, enabling them to effectively serve their communities while providing consistent, high-quality

assistance to those they serve. Yes, 211 will be discussed a lot, but the information should be accessible to any Community Navigation system.

Designing Strategies for Sustainable Resource Data Infrastructure

Gregory Bloom, Open Referral Initiative

Strategy is the process of deciding what we want to do in order to achieve our goals. Developing effective strategies often requires many different people to work together, share insights, and reach agreements. But data systems are abstract, and it can all too easily be boring or confusing to describe them. To help Community Navigation programs and their partners more effectively design successful strategies for the development and evolution of resource directory information infrastructure, Open Referral has developed a visual vocabulary to describe resource data systems and a collaborative process for generating strategic ideas. This session will introduce ways for you and your partners to "map" the landscape of resource directories in your community – and work together to design cooperative approaches that break the cycle of competing silos. We'll share examples of these collaborative practices in action – and prompt participants to practice drawing the resource data landscape of their communities and their organizations' strategies.

Ethics and Decision-Making about Artificial Intelligence

Inform USA Technology Committee

Inform USA's Technology Committee will host a session to explore the challenges of responsible implementation of AI in Community Navigation (I&R). This session will introduce key frameworks for thinking and action around AI – the set of principles proposed by Inform USA's AI Task Force and a decision-making framework for assessing the appropriateness of different kinds of AI for different purposes in our Community Navigation work. Attendees will have the opportunity to share their perspective, learn from peers, and contribute feedback that can help evolve these frameworks.

Introducing … the Accreditation First-Time Toolkit

Jennifer Abels, Inform USA

We know that going through an accreditation process can feel intimidating, especially for first-time applicants. And… Inform USA wants to encourage new programs to go through the process! Why? Because the learning that takes place as a result can't be replicated anywhere else, and the ultimate outcome is higher-quality community navigation services. Therefore, we have built a special toolkit to provide even more information up front about the process, in order to help you feel like you are fully informed and ready for success. Whether this is your organization's first time, or it is your first time being the lead contact on a re-accreditation, this session is for you!

A Person-Centered Approach to Community Navigation

Christina Bowen, Christina Neill Bowen Consulting, LLC; other speakers TBA

Person-centered practices are foundational to effective community navigation and a key component of the No Wrong Door system. Rather than focusing solely on programs or services, person-centered practices help professionals partner with individuals to identify their goals, preferences, strengths, and support needs to promote community living and self-determination. This high-impact, interactive session will explore practical strategies for integrating person-centered practices into everyday community navigation. Participants will learn how the Administration for Community Living and the No Wrong Door Resource Center are strengthening person-centered practices across coordinated networks and will leave with tools, including the No Wrong Door Tip sheets, and other implementation resources, to support person-centered approaches at both the individual and organizational levels.

Stronger Together: Creating Community Partnerships That Improve Database Quality

Analesse Nieves, Pocono Mountains United Way

This session explores how database curators can use resource and referral data to identify emerging trends, uncover service gaps, and better understand the populations they serve. Participants will learn practical strategies for transforming database information into actionable community intelligence that can support planning, advocacy, collaboration, and decision-making.

Suicide and Substance Misuse: What is the Connection?

Sherrard Crespo, VIA Link

Unnecessary stigmatization can often be the barrier for both those who would like support and those of us who are the help-givers. Substance use and suicidal ideation are two correlating topics inundated with misunderstanding and social stigmatization due to fear. These topics are common and nothing to fear or be ashamed of. This presentation will develop a greater understanding of the facts of suicidal ideation and its development in the brain, and how suicidal ideation and risk correlate with substance use disorder and particular risk factors. The goal of this training is to enlighten, break down barriers, and educate on how to respond to those who need our support.

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

Nichole Bonilla, 211 Los Angeles; Shirley Fulco, 211 Northeast Michigan; Jennifer Palmer, United Way of Southwestern Pennsylvania

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.

Taxonomy Training for Taxonomy Trainers: Engaging Exercises and Meaningful Metrics

Jennifer Palmer, United Way of Southwestern Pennsylvania

Indexing is among the most challenging pieces of a database curator's job, and training a new staff member on indexing can be even more difficult. Same goes for frontline contact center staff… the HSIS is the hardest part of the job until you understand it deeply. The presenter will lead a session that offers example exercises (with fun and funny twists), suggests scoring rubrics, and provides time for participants to test-drive the exercises and to share their own challenges, strategies, exercises, and outcomes. While the session will be presented through the lens of an experienced curation trainer and touch on database aspects that are not ONLY about indexing, the exercises are easily adapted for use in training contact center staff on the HSIS as well.

- A 211HSIS Login Credential will be helpful (but not required) for participants.
- Bring questions and your own training exercises, and be ready to share them!

Trauma Navigation in Community Navigation

Richard Shutes, Voice of Rich, LLC

Community Navigation professionals regularly hear stories of crisis, loss, violence, displacement, and unmet need while also managing their own lived experiences and well-being. This interactive session will identify how secondary traumatic stress, vicarious trauma, compassion fatigue, burnout, and moral distress may appear in frontline teams and affect both staff wellness and service delivery. Drawing on anonymized themes and feedback from practitioner support groups, participants will explore a practical toolkit for grounding, boundaries, peer connection, debriefing, reflective supervision, and recovery after difficult interactions. Participants will leave with individual and organizational strategies that shift resilience from a personal responsibility to a shared practice rooted in connection.

When the Call Is More Than a Call: Supporting Vulnerable Callers While Building Resilient Community Resource Specialists

Bernita Cauthon, United Way of Greater Kansas City

Community Resource Specialists regularly interact with callers experiencing crisis, trauma, grief, mental health challenges, housing instability, and other highly vulnerable life circumstances. This session explores how exposure to these difficult situations can affect specialists through compassion fatigue, secondary traumatic stress, and moral injury while also highlighting factors that promote resilience and professional well-being. Participants will learn practical strategies for maintaining empathy, managing stress, and supporting their own well-being while continuing to provide high-quality, person-centered service. The session will emphasize the connection between caring for vulnerable callers and sustaining a healthy, resilient workforce.

Working the Why: Aligning Organization Mission and Operations to Create Meaningful Outcomes

Emily Aubele, United Way of Southwestern Pennsylvania

This session is designed to help leaders of community navigation programs to reconnect daily work with the deeper mission that drives it. In fast-paced environments where innovation is often prioritized, we'll pause to refocus on the "why" behind the work—ensuring new ideas truly advance organizational goals. You'll gain practical strategies to recognize when daily operations and mission drift apart, and how to realign them with intention. Together, we'll move beyond routine thinking and build a culture of thoughtful, mission-driven innovation that keeps impact at the center.