



For updated information, go to the Agenda pages of the event's website<sup>1</sup>

All times Eastern

For additional information, visit <https://learn.airs.org/envision-ir-2021>

## **KEYNOTE OPENING**

Wednesday, May 12<sup>th</sup> at 11am

### **Reclaim your Passion and Purpose in Service Leadership**

*Carolyn Colleen, FIERCE Network, La Crosse, Wisconsin*

The focus of this one-hour keynote presentation is to rethink self-care in order to master our attention, perform better and be more engaging leaders. We can obtain both personal and organizational health, optimize our personal and professional ROI, and achieve sustainable success by starting with self. Carolyn shares her FIERCE method to help us increase our work/life quality by learning to harness our humanity to cultivate growth and collaboration, perform at our best and be busy, without losing our health to stress and burnout. Relationships, both personally and professionally, start with the one we have with ourselves.

Wednesday, May 12th at 12.30pm

### **Facilitating a “Scathingly Brilliant” Quality Program**

*Cheryl Stewart, United Way of Greater Atlanta, Atlanta, Georgia; Aria Smalling, United Way of Greater Atlanta, Atlanta, Georgia*

This workshop is designed for managers, supervisors, and quality professionals who are responsible for quality in their I&R organization/program. Participants will learn best practices in calibration, follow-ups, reporting outcomes and analyzing follow-up results to improve customer service and agency relationships. Participants will learn how to facilitate an effective Quality Assurance program with limited resources.

Wednesday, May 12th at 12.30pm

## **Using the ‘Community of Care’ Framework to Address Compassion Fatigue and Burnout**

*Karen Milligan, Ontario 211 Services, Toronto, Ontario; Jacky Roddy, Ontario 211 Services, Toronto, Ontario; Dr. Taslim Alani-Verjee, Silm Mental Health Services, Toronto, Ontario*

COVID-19 has tested us more than any other event in our recent history - and has had an impact on the way we hire, coach, and manage our teams. One year into our pandemic response, the level of compassion fatigue and burnout is high for those on the front line. In this session, we will talk about the Community of Care framework and psychological supports we put in place to ensure our teams could continue to be there for the people of Ontario long into the recovery from COVID-19.

Wednesday, May 12th at 2pm

## **Resilient and High-Quality Communication with your Team**

*Leanne Lytle, United Way of Greater Richmond & Petersburg, Richmond, Virginia*

Broadening our understanding of what it means to be “trauma-informed”, we’ll apply a resilience lens to a common model of interpersonal communication, identifying resilience based strategies for overcoming psychological “noise” and ensuring that we are contributing to effective, resilient and high quality communication with our colleagues and staff.

Wednesday, May 12th at 2pm

## **Accommodations: Best Practices for Employing Individuals with Disabilities**

*Ericka Reil, Vermont Center for Independent Living, Montpelier, Vermont; Nate Besio, Vermont Center for Independent Living, Montpelier, Vermont*

This workshop is designed for people working in the field, on the phone, managers and supervisors. Participants will learn best practices for working with people with disabilities, how to have conversations around reasonable accommodations and how accessible doesn’t always mean expensive. This is taught by people that live with disabilities and work in an information and referral field. This session is for you to ask questions, learn to expand your systems and be more inclusive of hiring, training and engaging people with disabilities.

Wednesday, May 12th at 2pm

## **Relationship Focused Metrics: A Different Measure of Success**

*Sara Chandler, Cystic Fibrosis Foundation, Bethesda, Maryland; Karen Carey, Cystic Fibrosis Foundation, Bethesda, Maryland; Cristen Clemm, Cystic Fibrosis Foundation, Bethesda, Maryland*

When a community member's needs go beyond a one-time call or single referral, when you value a relationship over turnaround time and patient outcome over speed in answering the phone, how do you measure success? This session highlights the unique factors that contribute to measurements of successful information and referral interaction outside the normal parameters of a call center environment. Our team measures success by the persistence of positive interactions and timely follow ups with information and referral that is specialized for the needs of a person living with cystic fibrosis, their families and healthcare providers.

Wednesday, May 12th at 3.30pm

### **In a Flash: Working with Non-Traditional Hires in a Disaster-Related Ramp-Up**

*Jennifer Hill, Greater Twin Cities United Way 211, Minneapolis, Minnesota*

I&R services across the country have pivoted to virtual operations while also taking on new programs. At Greater Twin Cities United Way 211, this included hiring, training, managing, and coaching more than 30 temporary staff for a new state housing program -- all in a virtual world. In less than two months, we created and launched a program in partnership with our state housing agency to disperse funds for rent, utilities and other bills to prevent homelessness. In this session, presenters will share the insights they learned from working with a large group of non-traditional hires during a disaster-related ramp-up, and help participants learn how to address some of the challenges with onboarding, training and coaching that can arise in these situations.

Wednesday, May 12th at 3.30pm

### **Getting More Out of Working Together: A Study of a Help Me Grow and a 211 Partnership**

*Elizabeth Gilman, Help Me Grow Vermont, Essex Junction, Vermont; MaryEllen Mendl, Vermont 211, Essex Junction, Vermont*

211 and Help Me Grow programs are partnering up to provide I&R and care coordination to families across the country. This partnership provides the opportunity to strengthen your ability to reach at-risk families, expands your resource knowledge and offers expertise in hard to navigate areas like social determinants of health and early intervention services for children. Working together, both programs provide professional development opportunities and support

for each program.

Wednesday, May 12th at 3.30pm

## **Veteran's Justice Outreach and Re-entry Programs: How the VA Helps Justice Involved Veterans**

*Matthew John Miller, St. Louis VA Health Care System, St. Louis, Missouri,*

Veterans with police involvement, criminal charges, or incarceration often have difficulty navigating traditional justice systems and obtaining positive outcomes. The VA has two programs that partner with justice systems to improve outcomes for those Veterans and their communities. This workshop will describe the missions, methods, and partnerships of those programs. Professionals who provide I&R to Veterans will learn how and when these programs can help, and how to refer Veterans to them in their communities. (NOTICE new title – is the description the same?)

Thursday, May 13th at 11am

## **Lobbying for I&R while Leading your I&R!**

*Joshua Pedersen, United Way Worldwide, Alexandria, Virginia; Catherine Rea, Heart of Florida United Way, Orlando, Florida; Meredith Ponder, Matz Blancato, Washington, District of Columbia*

As federal, state and local governments are increasingly leaning on I&Rs as the “go to” solution for all manner of needs and situations, I&Rs themselves need better tools to claim the resources to do this work. But who has time for advocacy when we are busy taking calls and managing our programs – even when renewed interest in I&Rs among elected officials is requiring us to step into the public policy spotlight? This workshop will explore how to legislate support for I&R in all levels of government.

Thursday, May 13th at 11am

## **Collaboration and Innovation to Meet the Challenge of COVID Social Isolation**

*Sara Tribe Clark, Eldercare Locator, National Association of Area Agencies on Aging (n4a), Washington, District of Columbia; Nanette Relave, ADvancing States, Washington, District Of*

*Columbia; Sherri Clark, United States Administration for Community Living (ACL), Washington, District of Columbia; Rebecca Levine, National Association of Area Agencies on Aging (n4a), Washington, District of Columbia*

Collaboration and innovation have been central to strategies employed by Aging Network I&R leaders to meet the growing challenge of loneliness and social isolation as the COVID-19 pandemic persists. This workshop highlights why social engagement is so important to the mental and physical health of older adults and people with disabilities; how I&R programs can incorporate social isolation into their work on social determinants of health; and reviews collaborative and innovative best practices from the federal, state and local perspectives. Join us to hear from your colleagues about what has worked and share your own social engagement successes.

Thursday, May 13th at 12.30pm

### **Effective Remote Training and Team Management**

*Monique Keels, Community Legal Services of Mid-Florida, Orlando, Florida; Saasha Williams, Community Legal Services of Mid-Florida, Orlando, Florida*

Did you know that 87% of new employees are not fully committed to a new job for at least the first six months? Employees report ineffective training, unclear guidelines about job responsibilities, lack of interaction or attention from co-workers and management, as primary reasons for leaving an organization. This process can be more frustrating when you introduce new hires to a remote onboarding process.

Within our organization, Community Legal Services of Mid-Florida, we worked tirelessly to ensure that we did not compromise new hire experience while working remotely during the pandemic. This was accomplished by studying our existing onboarding program experience and discovering ways to integrate new technologies and procedures to ensure that our attorneys, staff, and interns were properly trained. Throughout the forced time away from our office, we learned how to engage new hires differently and increased overall satisfaction.

Thursday, May 13th at 12.30pm

### **Taking Text to the Max: Effective Best Practices in I&R**

*Erik Drumm, Pidj.co, Denver, Colorado; Brandon Elwood, Pidj.co, Denver, Colorado; Sandra Carpio, United Way of Salt Lake/Utah 211, Salt Lake City, Utah*

It's proven that texting is the fastest and most efficient way to reach your community. Whether looking to spread the word to increase campaign engagement, enlist volunteers, request donations from members, or perform simple follow ups, nothing beats the ease and personal feel of a text. Learn how text messaging can reduce hold times, provide more effective disaster response, increase agent capacity, and garner greater community engagement

Thursday, May 13th at 12.30pm

## **Data is the New Gold**

*Mary Miller, United Way Worldwide, Alexandria, Virginia; Myeta Moon, United Way Worldwide, Alexandria, Virginia; Melissa Ladd-Patnode, Lifeways Community Mental Health, Hillsdale, Michigan*

Gold isn't valuable in its raw state. First, it needs to be processed and manipulated into jewelry. Similarly, data is valueless when collected in isolation. By sharing data, we unlock additional value and accelerate innovation. Data sharing is vital to promoting the health, education, and financial stability of every member of a community. It is essential because it can enhance decision-making capabilities, build learning organizations and finally, stimulate cultural change and innovation. Cross-sector data sharing enables communities to use individual and community-level information to understand acute community needs and lead to improved services, systems, and practices. Collaborative learning leads to developing innovative policies and interventions; and, ultimately, builds stronger communities. Increasingly, local and state 211s and United Ways are embracing data sharing as a core function of their modern community impact work as they convene or partner on collective impact initiatives seeking to drive equitable, person-centered impact. Join this session to learn more about resources and collaboratives United Way Worldwide is supporting and how your organization can access them.

Thursday, May 13th at 2pm

## **Community Information Exchanges and the Re-imagining of Care Coordination**

*Alana Kalinowski, 2-1-1 San Diego, California; Greg Bloom, Open Referral, Miami Beach, Florida*

Community Information Exchanges (CIEs) present a major opportunity for I&R providers to serve as essential elements of a cooperative ecosystem of coordinated care. In a CIE, an I&R would serve not just as a source of information about services for people, but as a hub in a network of sharing information about people among services. Contrary to some popular beliefs, however, a CIE does not entail the deployment of a single software solution. Rather, a CIE entails the development of shared infrastructure, open protocols for data exchange, and systems of community governance.

Thursday, May 13th at 2pm

### **Leaning into the “I” of I&R**

*Laura "LJ" James, United Way North Carolina, Cary, North Carolina; Jennifer Abels, Helpline Center, Sioux Falls, South Dakota*

We talk about I&R as a matched pair, but let's be honest, our work can spend a lot of time working on the “R”, specifically with regards to our database of community resources. In this presentation, two database curators will discuss how they have approached incorporating a focus on the “I”, and how they have included the “I” into their database to ensure a well rounded connection to information for both staff and public users of the resource database.

Thursday, May 13th at 2pm

### **To Go or not to Go (Back to the Office) – That is the Question!**

*Mike Lightbody, University of Iowa, Iowa City, Iowa*

While we are still deep in the turbulent times of the pandemic many employees continue to be required to work from home. But when the pandemic ends and we are all clear to come back to the office some employees will prefer not to while others can't wait to get back. Information and Referral services are in a unique position as a knowledge-based industry to offer a variety of flexible work arrangements. In this presentation attendees will explore the history and current landscape of remote work to help re-envision the future of the call center workspace.

Thursday, May 13th at 3.30pm

### **The “Cultural Awareness Tool”: A DEI Conversation**

*Camica Credle, Credle Consulting, Toano, Virginia; J Lamont Harris, Curtis-Harris Education Foundation, Atlanta, Georgia*

Go beyond traditional diversity, equity, and inclusion practices to boldly create a lasting impact in your workforce, team, and community. Make connections with others, be inspired, build a playbook of implementable strategies to transform business workplaces and community culture into one of real inclusion. This "Cultural Awareness Tool" is not about asking people to change their values or core beliefs. Instead, the conversation on diversity, equity, and inclusion is about holding space for difficult-but-necessary conversations and being open to ideas, perspectives, and experiences, outside of your own.

Thursday, May 13th at 3.30pm

## **Using a Chatbot to Address Barriers to Access**

*Russ Jensen, Knoxville's Center for Service Innovation 311/211, Knoxville. Tennessee*

Knoxville's Center for Service Innovation 311/211 premiered a chatbot in March 2020 to provide basic information about the U.S. Census and, soon after, the COVID-19 pandemic. The chatbot also links users to TN211.org if they are seeking community resources such as assistance with rent, housing and utilities. The chatbot is available 24 hours a day, making it accessible when 311/211 representatives are unavailable after office hours or due to an increase in the volume of calls.

Thursday, May 13th at 3.30pm

## **The New World of Outreach: Thanks to COVID**

*Janna Shoe, United Way of Greater Houston, Coastal Bend (Corpus Christi) Region, Texas; Halley Goldstein, United Way of Greater Houston, Houston, Texas*

Virtual and remote environments have become a new way of performing outreach and education about I&R programs during the COVID-19 response. Our COVID-19 dashboard reports improved outreach efforts and led to new opportunities for partnerships such as with county and elected officials, a newly formed Social Determinants of Health project, and funding from OneStar Foundation. Most importantly, outreach influenced social service agencies receiving CARES Act Funding on how to decide funding priority and eligibility for clients affected by COVID-19. Disaster outreach related to COVID-19 increased dramatically with new opportunities due to COVID-19 response.

## **FRIDAY KEYNOTE**

Friday, May 14<sup>th</sup> at 11am

## **Leadership Starts with You – Becoming your Organization's Emotional Regulator**

*Lisa Dion, lisa-dion.com, Boulder, Colorado*

The focus of this one-hour keynote presentation is to inspire leaders to understand the critical role they play in the health and well-being of their organization in a way that they may never

have considered. That they are indeed the "emotional regulator" for their teams and staff, helping ground the organization itself and the individuals working in it. They will be invited to view their organization through the lens of neuroscience and nervous system regulation, as they learn about the brain, stress, and the impact their own nervous system activation has on others and even on the growth of the organization. Most importantly, they will be inspired as they learn about self-care, the management of their own internal states, their ability to regulate the emotions of others, and how to help their organization stay steady. The result of this powerful keynote presentation is a deeper awareness of what self-care for themselves and their staff really is, and ultimately, what it means to be a leader.

Friday, May 14th at 12.30pm

### **Bracing for IMPACT: Leading with a Growth Mindset**

*Juanita S. McDaniel, United Way Worldwide, Alexandria, Virginia; James Collins, Director of Impact Strategy, Greater Twin Cities United Way, Minneapolis, Minnesota*

All too often when you hear the phrase 'brace for impact' there is an immediate sense of an impending catastrophe, but why can't we alter that mindset, why aren't we collectively bracing for our IMPACT, viewing our network as Individuals Making Progress Across Communities Together. 211, long a critical yet more recently overlooked community asset, has experienced a renewal over the course of the past year. 211s are creatively leveraging program infrastructure to advance their mission and create more equitable access to vital community resources. The concept of the Modern United Way challenges 211 leaders to leverage each of our unique assets in order to create stronger communities in ways that require a growth mindset, hard work, creativity, and continuous learning. This session will focus on how approaching these challenges with both a growth mindset and an eye towards continuous learning can not only increase impact but create a stronger 211.

Friday, May 14th at 12.30pm

### **Maximum Interoperability: Imports, Exports, APIs and other**

**Superheroes** *Dr. W. Douglas Zimmerman, VisionLink, Boulder, Colorado*

Your information about community services is valuable. Shared with others, it is exponentially more so. Indeed, now we expect data will flow frictionlessly between an ever-expanding network of agencies and organizations. This workshop will be an intensive primer on all

methods of data exchange, key standards to understand, how to talk to partners about their data exchange needs, and how not to be taken for a ride.

Friday, May 14th at 2pm

### **Better Together: Team-Based Interventions for Burn-Out and Stress**

*Erika Galyean, Indiana School of Social Work, Indianapolis, Indiana; Jaimie Ferren, Indiana 211, a division the State of Indiana's Family & Social Service Administration (FSSA), Indianapolis, Indiana; David Berman, Mental Health America of Indiana, Indianapolis, Indiana; Kimble L. Richardson, Community Health Network, Indianapolis, Indiana*

Does your call center team show signs of being overwhelmed and burned-out from managing the stress of the pandemic while also working with the stress of high call-volume and high emotion callers? This session will help you identify the signs and symptoms that indicate a team-based intervention could be undertaken to support your staff. You will learn about an innovative team check-in model that was successfully used for team support during the early phase of the COVID-19 pandemic by a 211 call center. This model was designed to support the well-being of telephone crisis workers, and promote workplace wellness, positive coping, and team support.

Friday, May 14th at 2pm

### **Leveraging Partnerships Creatively to Move your Program Forward**

*Paul Short, Face to Face Space Coaching and Training, Medford, New Jersey*

Are you ready to utilize signature partnerships? Many of us in board leadership, management, or direct services turn to an auto-pilot mindset or we are stuck with the following question: 'How do I move this program/project/resource forward creatively?'. Current partnerships become cumbersome, dry and obsolete. Come ready to view partnerships interactively from a fresh perspective! Learn how to identify, capture, engage, and sustain, the right partnerships in your community, empowering and equipping you with sharper tools to yield greater results. Activate a strategic plan to advance your programs and projects and resources. Participants will receive a new vision for their desired outcomes.

Friday, May 14th at 2pm

### **Providing Meaningful Services across Multiple Stakeholders and Geographies**

*James Collins, Greater Twin Cities United Way, Minneapolis, Minnesota; Larry Olness, United Way of Central Minnesota, St. Cloud, Minnesota*

Imagine if 211s and United Ways had matching service areas that nicely overlaid with county and state boundaries! In the real world, we all work together to provide meaningful and quality services across multiple stakeholders and geographies. In this session, a panel will share Minnesota's experience bringing together United Ways and 211s from across the state to renew statewide cooperation and focus on the value of 211. A 2019 statewide task force led to significant changes in 211 service delivery in Minnesota and reinvigorated the relationship between MN 211 and local United Ways across the state. Join us to learn about what we did and what we learned along the way.

Friday, May 14th at 3.30pm

### **CLOSING PLENARY**

Featuring the Sectional Winners of the AIRS Innovation Awards, a progress report on an AIRS Group working on diversity, equity and inclusion issues; and some special surprise guests!