



All times Eastern

AIRS member price for full three-day E-Conference (includes access to all recordings) is \$80 until April 9<sup>th</sup> and \$100 after April 9<sup>th</sup> (AIRS Platinum members receive an extra 15% discount)

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

## KEYNOTE OPENING

Wednesday, May 12<sup>th</sup> at 10am

### **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 11.30am

## **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 11.30am

## **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 1pm

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

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

Broadening the framework of what it means to be trauma-informed, we will apply a resilience lens to a common model of interpersonal communication, identifying resilience-based strategies for overcoming communication ‘noise’ and ensuring that we are contributing to effective, resilient and high-quality communication with our co-workers and staff.

Wednesday, May 12th at 1pm

## **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 session will share best practices for talking to people with various disabilities, understanding that accommodation does not always mean money, and learning how to start conversations within your organization with people who have disabilities.

Wednesday, May 12th at 1pm

## **Bracing for IMPACT (Individuals Making Progress Across Communities Together)**

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

A 'brace' is a support that helps to steady or strengthen, and 'to brace' is to prepare for something hard. All too often when you hear the phrase 'brace for impact', there is an immediate sense of impending doom, but why can't we change that? Why aren't we collectively bracing for our IMPACT, viewing our network as *Individuals Making Progress Across Communities Together*. Prior to COVID-19, 211s were experiencing a gradual decrease in call volume and questioning about the value of our services. Since COVID-19, our call volume has increased substantially and continues to climb. Not only did we shift our way of doing business, but we had to shift our mindset to find new and innovative ways to serve our community. Our communities have enlisted us for assistance across all aspects of the COVID-19 response and at times this has created angst and uncertainty about whether or not we have the bandwidth to meet the demand. This is at the core of the 'Modern 211' and *Leading with a Growth* mindset which allows us to take on and learn from challenges, therefore increasing our abilities and our impact. We can't be afraid to take chances and use our strengths to provide solutions.

Wednesday, May 12th at 2.30pm

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

*Jennifer Hill, Greater Twin Cities United Way 211, Minneapolis, Minnesota; Megan Williams, 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 2.30pm

### **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*

211s and Help Me Grow programs across the country are partnering to provide I&R and care coordination to families. 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 such as social determinants of health and early intervention services for children. Working together, both programs provide professional development opportunities and mutual support.

Wednesday, May 12th at 2.30pm

### **Options After Prison: VA Programs that Support Veterans with Criminal Histories**

*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.

Thursday, May 13th at 10am

## **Coaching your Team with Self Awareness and Emotional Intelligence**

*Jennifer Cabral, Utah 211, Salt Lake City, Utah*

It has never been more imperative to create workspaces that promote human connection, self-awareness, and emotional intelligence. This session will present techniques to help you perform efficiently while navigating the challenges associated with being effective in the new workplace. It will also present proven coaching techniques on how to make quality a priority, how to instill confidence, and how to make our work meaningful to those we serve.

Thursday, May 13th at 10am

## **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 10am

## **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 11.30am

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

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

87% of new employees are not fully committed to a new job for at least the first six months. Employees report that ineffective training, unclear guidelines about job responsibilities, lack of interaction or attention from co-workers and management, are primary reasons for leaving an agency. It is important to realize that the onboarding process is ongoing and does not just conclude at the end of the first week. Some reports state that the average onboarding may take months. These difficulties and challenges are compounded in a remote environment. This was the case for Community Legal Services of Mid-Florida. When new hires came aboard throughout the course of the pandemic, we confronted this task of remote onboarding head-on. Our goal was to create expectations but not compromise new hire experience while working remotely. Most notably, we created and revitalized our onboarding program by integrating new technologies and procedures to ensure that our attorneys, staff, and interns, were properly trained. Through an 11-month process, we learned how to engage new hires differently and increase overall satisfaction.

Thursday, May 13th at 11.30am

## **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.

Thursday, May 13th at 11.30am

## **Data is the New Gold**

*Mary Miller, United Way Worldwide, Alexandria, Virginia; Myeta Moon, United Way Worldwide, Alexandria, Virginia*

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 1pm

## **I&Rs and Community Information Exchange Hubs**

*Karis Grounds, 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 1pm

## **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 1pm

## **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 are enjoying the freedom and benefits of working from home. But when the pandemic ends and we are all clear to come back to the office, many employees will prefer not to. In this presentation, we will go over the practices you need to have in place to support (or not support) that decision to go from an employee that works from home to a full-time remote worker.

Thursday, May 13th at 2.30pm

## **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 2.30pm

## **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 2.30pm

## **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 10am

## **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 11.30am

### **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*

How do you measure success when an individual's needs go beyond a one-time call or single referral, or when you value a relationship more than turnaround time, and patient outcomes more than call answering speed? This session highlights the unique factors that contribute to measurements of a successful I&R 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 an I&R service that is specialized for the needs of a person living with cystic fibrosis, their families and healthcare providers.

Friday, May 14th at 11.30am

### **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 1pm

### **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 1pm

### **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*

Texting is the fastest and most efficient way to reach your community. Whether you are looking to spread the word to increase campaign engagement, enlist volunteers, solicit donations from members, or perform simple follow ups, nothing beats the ease and personal feel of a text.

Friday, May 14th at 1pm

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

*Julie Ogunleye, Greater Twin Cities United Way 211, Minneapolis, Minnesota; 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 2.30pm

### **Closing Plenary**

Featuring the Sectional Winners of the AIRS Innovation Awards and some special surprise guests!