THE ALLIANCE OF
INFORMATION & REFERRAL SYSTEMS (AIRS)

30th I&R Annual Training and Education Conference
May 18–21, 2008

Deep in the Heart of TEXAS!
Exploring New Frontiers of I&R

PROGRAM BROCHURE
The Westin Galleria & Westin Oaks, Houston, Texas
www.airs.org

Co-Sponsored By:
National Aging Information and Referral Support Center

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Welcome to the AIRS 30th Annual I&R Training and Education Conference and to scenic Houston, Texas. We appreciate your commitment to our industry and to AIRS by attending this year’s conference, we are sure it will be an educational and exciting experience for you!

It seems like it was just yesterday, that we were in Jacksonville, Florida at our annual conference and I was asking you to join me on a journey to take AIRS to greater heights, places we had never dared to go before. Where did the time go? I don’t know where it went, but I do know we are having an extraordinary year and dared to go places that we had not been before.

Our hard working conference committee, conference program committee, local Texas hosts and our staff have worked hard all year to bring you the best AIRS I&R conference, with more than hundred speakers and almost 90 informative sessions. The I&R Demo Pavilion held right in the exhibit hall, will provides 45 minute sessions, giving you an exclusive opportunity to get a hands-on demonstration of participating company’s products and services. Our vendor and sponsor partners, are committed to providing our industry with the latest products to help us do our jobs better. Please be sure to stop by their booths to learn about their products and services and to thank them for their generous support.

“Exploring New Frontiers of I&R” offers you many educational workshops with information and tools you can take home and put to use immediately. In addition to our popular workshops, we have several networking events offering you the opportunity to meet, mingle and share with your colleagues from across North America and Europe. The opening reception in the exhibit hall, the meals sponsored by our partners in Aging and DOD, networking breaks in the exhibit hall and of course, dinner at the George Ranch, and “Houston We Have a Party” the Friends of AIRS Silent Auction & dance party, promise a fun and exciting time. We are pleased you can join us!

I look forward to “Exploring New Frontiers of I&R” with you!

Jamie Moore
AIRS President
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For almost two decades, the National Association of State Units on Aging has convened this very important national symposium to support the professional development of information and referral/assistance staff within the aging network. Working with outstanding partners, the Alliance for Information and Referral Systems (AIRS), the U.S. Administration on Aging (AoA) and the National Association of Area Agencies on Aging (n4a), the symposium offers comprehensive, cutting edge learning opportunities to improve information and referral program development, services to consumers and staff training. Each year, the symposium has been held in conjunction with the Annual AIRS Conference. This has afforded a rich laboratory for the cross fertilization of ideas, an opportunity to showcase aging issues and a place to celebrate the national identity information and referral professionals regardless of specialized population focus.

This year’s Aging and Disability Symposium takes a serious look at empowerment of older consumers, persons with disabilities and caregivers. Sessions examine economic security, community living and the continuing evolution of Aging and Disability Resource Centers. When we offer information and referral professionals an opportunity to engage with one another, examine new tools, and share cutting edge program information, we begin the important journey of helping to empower older adults, persons with disabilities and caregivers to take charge, plan for the future and benefit from options counseling and advocacy supports.

Our nation is on the precipice of change. Our aging network is seeking to elevate communication with consumers like never before through world class conversations. Efforts to engage consumers in thinking and planning for future long term care needs, working toward shaping livable communities and taking steps to secure valuable public benefits in new ways are happening in aging information and referral programs across the nation. Celebrating one of the oldest and most comprehensive networks of information and referral/assistance, the aging network is poised to meet the challenges of more consumers, complex service delivery systems and greater desire for choice.

We welcome our aging network of state, area agency and local provider organizations for what we believe will be an unparalleled learning and networking experience at this year’s National Aging and Disability I&R Symposium. To those outside of our network who come to this conference seeking to learn more about aging and disability issues, we welcome you to join us and make good use of our aging track. And to our guest speakers, we are grateful for your expertise and contributions to this symposium.

Enjoy the Aging and Disability I&R Symposium!

Bernice Hutchinson  
National Aging I&R Support Center  
National Association of State Units on Aging
Welcome from the Department of Defense

I would like to take this opportunity to welcome you, on behalf of each military branch representative, to the 30th Annual AIRS I&R Training and Education Conference, and to Houston, Texas! Your commitment to our service members and their families is evident by your attendance this week, and is truly appreciated.

I would also like to thank the members of AIRS for their enduring commitment to the military and for their support during the planning and execution of this conference. For the past 16 years, the Joint Services have been involved in collaborating with AIRS for training and education, and this year’s conference looks to be just as successful!

Continued education and professional training are critical to ensuring that we are offering our service members and their families programs that are current and relative to their needs. This year’s military training track provides sessions that afford you the opportunity for personal and professional growth, as well as information that will help you to enhance the I&R service delivery at your location. For example, “What’s it All About- Work-Life Balance in 1 Hour” which is being presented by Jerry Lewis, retired Quality of Life Coordinator for the 4th Marine Corps District, offers you a chance to learn about time management while establishing a real-life to do list. Additionally, sessions like “Home from the War: Where Can I Get The Help I Need?” by Beth Wick & Dr. Kathryn J. Kotrla, and “Transitioning the Marine Corps Family Readiness Programs”, provide helpful information on programs available to better support our service members, regardless of whether they are located on an installation, at joint service locations, or with the Guard and Reserves.

This year’s theme “Exploring New Frontiers of I&R” is most appropriate as we continually strive to understand the various aspects of I&R and what resources are available, both inside and outside of the gates. It is my hope that you will take advantage of this opportunity to learn, network with your military and civilian counterparts, and return to your locations with new contacts and fresh ideas. Have a wonderful conference experience!

Kim Gates
Head, Marine Corps Family Team Building,
Headquarters, U.S. Marine Corps,
Military Liaison, Alliance of Information & Referral Systems
Welcome to Houston and the Lone Star State! Houston is the nation’s 4th largest city, a vibrant international metropolis that heartily enjoys its tradition of being a place of firsts. General Sam Houston, the city’s heroic namesake, was the first president of the Republic of Texas. “Houston,” the city, was the first word spoken from the surface of the moon and the first to build an air-conditioned sports stadium. Houston surgeons have performed numerous firsts in heart surgery, and the city is leading the medical community in making cancer history. Known around the world for NASA Space Center in the Clear Lake area and Texas Medical Center, Houston is also the proud home of an array of performing arts groups, professional sports teams, shopping destinations and great restaurants.

We are honored to serve as your host for the 2008 AIRS conference. It is our goal to show you the true Texas spirit of friendship (our state motto) during your visit. Come prepared for all kinds of weather as ours tends to change rapidly, temperatures may range from 60 to 90 in a 24-hour period; we might have wind, rain or hail, but one things for sure…it won’t snow! More than likely most days will be bright and sunny, just right for shopping, sightseeing and making new friends. At our host city event, you’ll travel across time through 180 years of Texas history at the George Ranch Historical Park, a working ranch complete with cowboys, longhorns and chuck wagons; you’ll see a living testament to the independent spirit of Texas!

The Texas Alliance of Information and Referral Services (TAIRS) is celebrating its 30th anniversary of maintaining the highest level of professional I&R services. This year’s AIRS conference will mirror our regional commitment to training and professional development for I&R service providers. As part of the statewide 211 Texas network, in collaboration with the Texas Health & Human Service Commission, Houston has joined 211 colleagues across the state to provide round-the-clock service 365 days a year. Recent disasters have showcased our unique ability to respond in times of crises, and emphasized the importance of preparing for the unexpected.

Many thanks to our statewide TAIRS board members for their exemplary efforts to provide a memorable experience for our national colleagues. Our goal is to make this the best AIRS conference ever!

Watch out for armadillo crossings and don’t eat too many chili peppers! Y’all have a great time and come back soon!

Welcome to Texas Y’All!

David Jobe
TAIRS President
Director, Information and Referral
United Way of Greater Houston
The National Aging I&R Support Center invites you to participate in the 2008 National Aging and Disability I&R/A Symposium. The Symposium is convened by the National Aging I&R Support Center at the National Association of State Units on Aging (NASUA) in collaboration with the U.S. Administration on Aging and the National Association of Area Agencies on Aging. The role of the Center is to provide support and assistance to State and Area Agencies on Aging, Aging & Disability Resource Centers, and information and referral/assistance service providers to enhance the quality of I&R/A service systems, service delivery, and professionalism of personnel.

This symposium offers an exciting blend of workshops that examine the dynamic role of information and referral/assistance programs, emerging trends affecting systems and service delivery, and cutting edge initiatives from across the country. These sessions will interest aging network professionals, but also any person who works with the aging and disability populations, their families, and their caregivers. For more information about the Support Center, log onto www.nasua.org or contact the National Association of State Units on Aging at 202-898-2578.

Conference Highlights

Pre-Conference Training:

Sunday, May 18, 2008 (9:00 am – 4:15 pm)
These three pre-conference training opportunities offer participants the opportunity to explore topics in greater detail. These all-day sessions run concurrently. Pre-registration is required.

The ABC’s of I&R
Galleria 2
Instructors: Faed Hendry, Findhelp Information Services, Toronto, Ontario and Shye Louis, 211/LIFELINE, Rochester, New York
This workshop is designed to assist new I&R Specialists more fully understand the theory and practice that leads to I&R excellence. This intensive is also an invaluable refresher for more experienced I&R staff, especially those who may be taking a CIRS or CIRS-A exam over the course of the year. The workshop will present an overview of I&R, its philosophy and components, techniques for problem assessment and communication, giving information and making referrals, dealing with difficult callers, and the role of advocacy and empowerment. The session includes an exploration into personal and professional growth, strategies for taking a certification exam, role playing, problem solving and group activities.
Faed Hendry and Shye Louis are both very experienced practitioners in the myriad arts of I&R who both regularly provide training to external agencies in addition to the their internal staff. Faed is Manager of Training and Outreach with Findhelp Information Services/211 Toronto. He is also the Chair of the AIRS Standards Committee. Shye is Operations Manager with 211/LIFE LINE in Rochester NY in addition to being a NYS AIRS Board member and a member of the AIRS Training Committee.

The I&R Supervisor’s Toolkit
Tanglewood
Instructor: Sandra Ray, United Way of Greater Houston, Texas
The I&R Supervisor’s Toolkit ... Are you an I&R supervisor? Or are you ready to prepare for that eventual promotion?! This intensive will outline the knowledge and techniques that will help make you a better supervisor. Quality assurance, team building, skills coaching and the basics of human resource management are among some topics to be covered. Participants will be able to identify some of the challenges and requirements of the transition from being a good I&R practitioner to being a good I&R supervisor.
Sandra Ray is the I&R Manager for 211 Texas/United Way Helpline, a program of the United Way of Greater Houston. She has more than 12 years experience in I&R, grant writing, nonprofit administration, and program development. Her duties at United Way include training and day-to-day oversight of more than 45 I&R Specialists. She holds a Bachelor of Arts in English and a Master of Science in Psychology, both from Angelo State University in San Angelo. She is a Certified Information and Referral Specialist and a freelance writer.

Critical Incident Stress Management
Bellaire
Instructor: Vaughn Donaldson, International Critical Incident Stress Foundation, Midland Fire Dept, Midland, Texas
This intensive provides hands-on training in the delivery of crisis intervention to individuals working in disasters.
Upon completion of this course, participants will be able to recognize the effects of critical incident stress in co-workers and themselves, identify which crisis intervention technique would be best in disaster situations and help facilitate small group crisis intervention meetings.

Vaughn Donaldson is an approved trainer of the International Critical Incident Stress Foundation (ICISF), and was recognized in 2008 by the ICISF with the Excellence in Training and Education Award at the World Congress on Trauma, Stress and Coping. With over 20 years experience as a paramedic and firefighter, Vaughn has presented at a vast array of state, national and international conferences including the International City Managers Association, the FBI Academy Associates and the Environmental Protection Agency. In addition, he has conducted training for numerous groups and organizations including the U.S. Army, Air Force and Marines. He also holds a BA in Psychology from University of Texas.

Aging Symposium Retreats
Sunday, May 18
The National Aging and Disability I&R/A Symposium will include a special retreat for State Unit on Aging and Area Agency on Aging staff. This full-day, pre-conference event is designed to examine critical systems development and service delivery issues facing the aging network, facilitate exchange about strategies to address key concerns, and to offer an opportunity to network with peers from around the country.

The retreat opens with the traditional separate breakfast meetings for SUA and AAA staff during which participants receive public policy and national association updates. Following breakfast, SUA and AAA staff comes together for the remainder of the day. This highly interactive session provides opportunities for dialogue and discussion about current and upcoming national activities and trends with a focus on successful approaches for meeting the challenges facing the aging I&R/A service system.

Department of Defense Workshops
The Department of Defense training track consists of eight military workshops. The sessions in the military training track have been selected for their value, personally and professionally in helping meet the needs of military personnel and their families. The track will also include an opportunity for military personnel to meet with their respective Service Department representatives.

AIRS Certification Exams
Sunday, May 18, at 1:30 pm Monarch Room
Tuesday, May 20, at 2:30 pm Monarch Room
AIRS offers the only performance-based internationally recognized credentialing program in the field of Information and Referral. Exams for Information and Referral Specialists (CIRS), Resource Specialists (CRS) and Specialists in Aging (CIRS-A) will be given on Sunday, May 18th, at 1:30 pm and Tuesday, May 20th, at 2:30 pm. You must be pre-registered and approved through the AIRS National Office to be eligible to take the exam.

Newcomers’ Orientation
Sunday, May 18
4:30 pm – 5:30 pm
West Alabama
All new members and first time attendees are invited to join the AIRS Board of Directors, staff and local hosts to ask questions about AIRS, network, learn about the conference and city of Houston.

Department of Defense Welcome
Sunday, May 18
4:30 pm – 5:30 pm
San Felipe
Attendees from all branches of the military are invited to join us to ask questions about AIRS, network, learn about the conference and the city of Houston.

Welcome Reception in the Exhibit Hall
Sunday, May 18
5:30 pm – 6:30 pm
Woodway 1
Join your friends, peers and AIRS exhibitors at the opening event of the AIRS conference. Enjoy delicious appetizers and a cash bar while you get acquainted with colleagues tour the exhibit hall and meet our exhibitors in a fun-filled atmosphere.

“An Evening at the George Ranch”
Monday, May 19
5:00 pm – 9:00 pm
Join us for a real Texas style evening at the famous, George Ranch Historical Park. Journey to a place and time where cattle and cotton are king and Texas is a country all its own. Visit the George Ranch Historical Park and discover a treasury of Texas traditions. Originally settled in 1824 as part of Stephen F. Austin’s Colony by Nancy and Henry Jones, this 23,000-acre working ranch stands as a testament to the independent spirit of Texas.

Meet in the lobby at 5:00 pm when buses will take you on a scenic 45 minute drive to this popular Houston attraction where you will be served a delicious country BBQ buffet dinner and cash bar while you relive life in the Texas spirit. Listen to Lone Star State tunes and dance the “Texas Two Step” with our dancers and instructors. Enjoy live armadillo races, a souvenir custom brand, hob nob with “Cookie the chef,” “Dicey the Gambler,” an authentic singing cowboy and ride the roller roper, an event you won’t want to miss! This evening is included in your full registration fee.
211 Texas/United Way Helpline Site Visits
Tuesday, May 20
4:00 pm – 6:00 pm
Conference participants are invited to visit Houston’s 211/Texas United Way Helpline call center. A sign up sheet will be on the AIRS bulletin board by the registration desk, transportation will be provided. Begun more than 60 years ago as the local Helpline, Houston’s 211 operation is the largest in the state. United Way of Greater Houston operates 211 in its new headquarter that includes an array of community services. The facility includes the Community Resource Center and the Nonprofit Resource Library. Take a tour of the new facility and learn more about the Texas 211 network and special initiatives that serve Houston’s diverse community.

Friends of AIRS Party & Auction
Tuesday, May 20
7:30 pm – 10:00 pm
Monarch Room
“Houston, We Have a Party” Silent Auction and Dance! Be sure to attend the Friends of AIRS Silent Auction and dance party, a popular AIRS conference tradition. This astronomically fun event is to raise funds for the Friends of AIRS scholarship fund. Wear your pocket protectors, bring your slide rules and look forward to spending your money and having a great time. All proceeds benefit the Friends of AIRS Endowment Fund that provides 2 scholarships to every conference.

A cash bar and fun snack food will be provided. You’ll be over the moon this year at the Friends of AIRS dance party!

AIRS Annual Membership Meeting & Luncheon
Wednesday, May 21
12:30 pm – 2:00 pm
Galleria 1,2,3
Everyone is encouraged to join us at the annual membership meeting and delicious luncheon including the presentation of the AIRS Distinguished Service Award and awards of accreditation, and the opportunity to meet newly elected as well as returning board members.

Cyber Cafe
Open daily in the exhibit hall during exhibit hall hours. Keep in touch with your office, family, and co-workers online in the AIRS Cyber Café. Computers provided for your convenience.

I&R Demo Pavilion NEW THIS YEAR
Daily in the Exhibit Hall
Held right in the exhibit hall, these 45 minute sessions are your exclusive opportunity to get a hands-on demonstration of participating company’s products and services. Monday is reserved for Technology vendors, Tuesday is for Software vendors and Wednesday is for General vendors. A demo schedule will be available in the exhibit hall at the conference.

To Your Health in 2008!

Make this the year you take charge of health information for you and your family. A free subscription to NIH MedlinePlus, the Magazine, is your guide to the health care Web site your doctor prescribes—www.medlineplus.gov.

Millions of Americans have already taken advantage of the free MedlinePlus.gov Web site for trusted, up-to-date health information—and so should you. MedlinePlus.gov comes from the world’s largest medical library, the National Library of Medicine (NLM), a part of the National Institutes of Health (NIH), the nation’s premier medical research agency.

For more information about MedlinePlus.gov and other free resources from the National Library of Medicine, visit Booth 19 or contact the National Network of Libraries of Medicine at 1-800-338-7657.
Opening Breakfast Speaker  
**Monday, May 19**  
8:00 am – 9:45 am  
Galleria 1,2,3  
Anna M. Babin, President and CEO  
United Way of Greater Houston  
Anna Babin assumed responsibilities as President of the United Way of Greater Houston the same day that a massive evacuation of Hurricane Katrina survivors was converging on Houston. Her appointment marked a homecoming as she returned to the organization where she had once served as Chief Financial Officer.

A long time supporter of the United Way, Ms. Babin is passionate about the organization’s mission to “increase the organized capacity of people to care for themselves and other and to mobilize our community to make lasting improvements in critical social needs areas.” Ms. Babin benefited from United Way services in her teen years and recalls that time as both pivotal in saving her life and determining her future success.

Anna blends strategic thinking and business acumen with a wealth of social service expertise. This unique blend of skill and experience proved invaluable in United Way’s coordinated social service response to Hurricanes Katrina and Rita. A respected community leader, she is able to convene corporate, nonprofit and public sectors to strategically plan for United Way’s future. Vision 2012 is one example, with its $100 million goal to improve lives, tackle key community issues and make a lasting difference.

In her previous role as CEO of Catholic Charities, she led one of the largest Catholic social service organizations in Texas. A CPA, Ms. Babin, holds a degree in business administration from Lamar University. She previously worked with Price Waterhouse and Service Corporation International. A native Texan, Anna Babin is married, has two sons and two new granddaughters.

**“The Digital Television Transition: Educating and Empowering Older Adults and Persons with Disabilities”**  
Sponsored by: National Aging I&R/A Support Center, NASUA  

Anthony G. Wilhelm is responsible for the National Telecommunications and Information Administration’s (NTIA) consumer education and public information efforts for the TV Converter Box Coupon Program.

He was formerly the senior director of the Schools and Libraries Division at the Universal Service Administrative Company, which is based in Washington, D.C. He was responsible for the day-to-day operations of a $2.25 billion annual rebate program. Prior to his work there, Mr. Wilhelm directed NTIA’s Technology Opportunities Program. Previously, Mr. Wilhelm was vice president for programs at the Benton Foundation, a private foundation based in Washington, D.C., helping communities and nonprofit groups harness communication technology from broadcasting to the Internet. While at Benton, he launched several influential public information campaigns to expand the public’s knowledge of the impact and opportunity presented by the transition from analog to digital television. Mr. Wilhelm also has served as policy director for the Tomas Rivera Policy Institute as an expert in Hispanic telecommunications usage. Mr. Wilhelm earned a bachelor’s from the University of Virginia and a doctorate from Claremont Graduate University.

**Aging Luncheon Keynote Speaker**  
**Tuesday, May 20**  
12:15 pm – 2:00 pm  
Galleria 1,2,3  
Anthony G. Wilhelm, Ph.D.  
Director  
Consumer Education & Public Information  

TV Converter Box Coupon Program  
National Telecommunications and Information Administration  
United States Department of Commerce  
Washington, DC

Frank Kelley is a retired twenty year Air Force veteran with ten years as an enlisted man and ten years as an officer. His areas of service were in the Accounting and Finance field and an eventual cross training venture into the business of Manpower Management as a Health Services Resources Analyst. He retired from the Air Force in 1993 and in 1996 was selected to run the Fisher House on Keesler Air Force Base in Biloxi, Mississippi. He was selected to run the Fisher House in Katy, Texas before the ground was broken and has been involved with the process since 2004.

A Fisher House is a “home-away-from-home” for families of patients receiving care at major military and VA medical centers. The typical house can accommodate up to forty family members and features a common kitchen.
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dining room, living room, library and laundry facilities. Each Fisher House is run independently based on the mission of the location where they are based. Fisher Houses are located on Army, Air Force, Navy, and Veterans Hospital locations. Currently there are thirty eight houses in operation, including 2 in Germany and the goal is to have fifty by the end of 2010. Since its inception in 1990, the program has assisted more than 65,000 families by providing temporary lodging in a caring environment that allows military and veterans’ families to face a medical crisis together.

Mr. Kelley has Associates Degree in Resource Management through the Community College of the Air Force, his Bachelors of Science Degree in Resource Management from Troy State University and a Masters in Business Administration from William Carey College. He is married and has a daughter.

General Information

Conference and Presenter Evaluation Forms
Your feedback is important and needed in helping us plan future conferences. Please take a few extra minutes to complete evaluation forms for each workshop you attend and the overall conference evaluation form.

Continuing Education Units
Continuing Education Units (CEUs) are awarded to each participant who successfully completes conference workshops approved for CEU credits. The CEU is an internationally recognized unit, designed to provide a record of an individual’s continuing education accomplishments. One CEU is defined as ten contact hours of participation in an organized continuing education experience under reasonable sponsorship, capable direction and qualified instruction. Workshops that have been approved for CEU credit are listed on the CEU Form. The CEU Form is included in your conference packet if you paid the CEU fee.

To be awarded CEUs, you will need to do the following:
• Pay a fee of $30 for members and $40 for non-members.
• At each workshop you attend, print your name legibly on the sign-in sheet and sign your name in the CEU column.
• At the end of the conference, return your completed CEU Form to the Registration desk.

Name Badges
Your name badge is your admission to workshops, meals and special events, so please be sure to wear it at all times. If you purchased meal and special event tickets for guests, they should have been included in your registration packet. We apologize in advance, but you cannot be admitted to conference functions without your badge!

United Way Flexible Credits
United Ways will be able to use flexible credits to offset registration and some travel costs for the 2008 AIRS Conference. United Way of America (UWA) Flexible Credits may be used for: the pre-conference workshop registration fee, the conference registration fee, and some travel expenses and per diem. To check your flexible credit balance visit; https://online.unitedway.org/flexcredits (only for United Way members).
### Sunday, May 18, 2008
- **Registration** - Galleria Foyer 7:00 am - 6:00 pm
- State Units on Aging Retreat (SUA) - Plaza 1 8:00 am - 5:00 pm
- Area Agency on Aging Retreat (AAA) - Plaza 2 8:00 am - 5:00 pm
- The ABC’s of I&R Intensive - Galleria 2 9:00 am - 4:15 pm
- The I&R Supervisor’s Toolkit Intensive - Tanglewood 9:00 am - 4:15 pm
- Critical Incident Stress Management Intensive - Bellaire 9:00 am - 4:15 pm
- 211 State Directors Session - Post Oak 1:00 pm - 5:00 pm
- AIRS Certification Exams - Monarch Room 1:30 pm - 3:30 pm
- Department of Defense Orientation & Welcome - San Felipe 4:30 pm - 5:30 pm
- Newcomers Orientation & Welcome - West Alabama 4:30 pm - 5:30 pm
- Opening Reception in Exhibit Hall - Woodway 1 5:30 pm - 6:30 pm

### Monday, May 19, 2008
- Registration - Galleria Foyer 7:00 am - 5:00 pm
- Cyber Cafe Open in Exhibit Hall 8:00 am - 4:00 pm
- Opening Breakfast - Galleria 1,2,3 8:00 am - 9:45 am
- Exhibits Open 8:00 am - 6:00 pm
- Workshops 10:00 am - 11:30 am
- Lunch on your own 11:30 am - 1:00 pm
- Workshops 1:00 pm - 2:30 pm
- Refreshment Break in Exhibit Hall 2:30 pm - 3:00 pm
- Workshops 3:15 pm - 4:45 pm
- Buses Leave to Evening at the George Ranch 5:00 pm - 10:00 pm

### Tuesday, May 20, 2008
- Registration - Galleria Foyer 8:00 am - 6:00 pm
- Cyber Cafe Open in Exhibit Hall 8:00 am - 5:00 pm
- Breakfast on your own
- Exhibits Open 8:00 am - 5:00 pm
- Workshops 8:30 am - 10:00 pm
- Refreshment Break in Exhibit Hall 10:00 am - 10:30 am
- Workshops 10:45 am - 12:15 pm
- NASUA Sponsored Luncheon (Open to all) Galleria 1,2,3 12:15 pm - 2:00 pm
- 211 Assembly - Imperial Suite 2:15 pm - 3:45 pm
- Workshops 2:15 pm - 3:45 pm
- AIRS Certification Exams - Woodway 2 2:30 pm - 4:30 pm
- Dinner on your own
- Friends of AIRS Auction & Dance Party - Monarch Room 7:30 pm - 10:00 pm

### Wednesday, May 21, 2008
- Registration - Galleria Foyer 8:00 am - 12:00 pm
- Department of Defense Sponsored Breakfast (Open to all) Galleria 1,2,3 7:30 am - 8:45 am
- Cyber Cafe Open in Exhibit Hall 8:00 am - 3:00 pm
- Exhibits 8:00 am - 3:00 pm
- Workshops 9:00 am - 10:30 am
- Workshops 10:45 am - 12:15 pm
- Annual Meeting & Membership Luncheon (Open to All) - Galleria 1,2,3 12:30 pm - 2:00 pm
- Workshops 2:15 pm - 3:45 pm
- Conference Adjourns 3:45 pm
Workshops by Date & Times

Session 1 – Monday, May 19, 2008
10:00 am – 11:30 am
A-1 “National Initiatives, Trends and Resources in Aging and Disability I&R” Royal Suite
A-2 “Securing the Economic Stimulus Package for Aging and Disabled Clients” Plaza 2
C-1 “Quiz Show Questioning” Westchester
D-1 “Disaster Preparedness and Response: So you think that you are ready?” (Part 1) Imperial Suite
E-1 “Principles of Legislative Advocacy” West Alabama
F-1 “What’s it All About: Work-Life Balance in One Hour” Post Oak
G-1 “Successful Recruitment and Legitimization of Non-profit & For-profit Agencies to your Database” Plaza 1
H-1 “Telecommunication Equipment: It’s not about Technology, It’s about Service!” San Felipe
J-1 “Transitioning 211 Boards from Founders to a Governance Model” Tanglewood
K-1 “Home from the War: Where Can I Get The Help I Need?” Bellaire

Session 2 – Monday, May 19, 2008
1:00 pm – 2:30 pm
A-3 “Cash and Counseling: A Successful Model in Consumer Choice” Royal Suite
A-4 “Successful Service Delivery, Successful Partnership: Bridging the Gap Between Aging and Disability I&R Systems” Plaza 2
C-2 “Happy Trails: Working with Difficult Interactions” Westchester
D-2 “Disaster Preparedness and Response: So you think that you are ready?” (Part 2) Imperial Suite
E-2 “Call Monitoring: Moving from Meeting Funding Requirements to Exceeding the Caller’s Expectations” (Part 2) Tanglewood
F-2 “Home from the War: Where Can I Get The Help I Need?” Post Oak
G-2 “Taxonomy Website Tour” Plaza 1
H-2 “Sensible Computer Use: Minimizing Computer Health and Safety Risks” San Felipe
J-2 “Developing Local and State Funding for Your Comprehensive I&R Service or System” West Alabama
K-2 “Two, Four, Six, Eight … Who Do We Appreciate?” Bellaire

Session 3 – Monday, May 19, 2008
3:15 pm – 4:45 pm
A-5 “Creating Livable Communities for All Ages: What Does This Mean for I&R?” Royal Suite
A-6 “It Takes a Village: Maximizing I&R Resources for Benefits Outreach and Enrollment through Community
Mapping and Effective Partnership” Plaza 2
C-3 “Food, Shelter, Suicide: What’s An I&R Specialist To Do: Crisis Intervention and the AIRS Standards” Westchester
D-3 “FEMA and I&R” West Alabama
E-3 “Call Monitoring: Moving from Meeting Funding Requirements to Exceeding the Caller’s Expectations” (Part 2) Tanglewood
F-3 “Marine Corps Breakout Session” Post Oak
G-3 “Delivering Human Service Information on the Internet: A Scan of Practices in America’s Ten Largest Cities” Plaza 1
H-3 “Understaffed? Learn how to Optimize your Most Valuable Resource through Effective Scheduling” San Felipe
J-3 “Effective Public Policy for 211s” Imperial Suite
K-3 “Community Voice Mail and I&R: Working Together to Bridge the “Access to Information” Gap” Bellaire

Session 4 – Tuesday, May 20, 2008
8:30 am – 10:00 am
A-7 “Making the Transition from I&A to ADRC: Assessing Readiness for Change” Royal Suite
C-4 “When the West Gets Wild: Crisis Intervention for I&R” (Part 1) Westchester
D-4 “211 Data Analysis of Hurricanes Katrina-Rita Disaster Needs” West Alabama
E-4 “Volunteer Power: Harness the Power of Volunteers to Staff your Organization” Plaza 2
F-4 “The Four Lenses” (Part 1) Post Oak
G-4 “Disaster Knowledgebase with 211Texas.org” Plaza 1
G-5 “Indexing Using the AIRS/Info Line Taxonomy of Human Services” (Part 1) Imperial Suite
J-4 “Give Help: The Forgotten Half of 211” Tanglewood
K-4 “Assisting Military Families in Your Community” Bellaire

Session 5 – Tuesday, May 20, 2008
10:30 am – 12:00 pm
A-8 “How to Locate and Use Services for Seniors with Vision Loss” Royal Suite
A-9 “Creating Policies and Procedures for Your Aging Organization” Plaza 2
C-5 “When the West Gets Wild: Crisis Intervention for I&R” (Part 2) Westchester
D-5 “Community Collaboration for Disaster Related Case Management” West Alabama
E-5 “Applying Quality Assurance Tools in an I&R Program” Plaza 1
F-5 “The Four Lenses” (Part 2) Post Oak
G-6 “Indexing Using the AIRS/Info Line Taxonomy of Human Services” (Part 2) Imperial Suite
J-5 “Engagement of State Government with 211 Coalition Building” Tanglewood
K-5 “Following the Dream: Reaping the Reward!” Bellaire

Session 6 – Tuesday, May 20, 2008
2:15 pm – 3:45 pm
A-10 “Creative Strategies to Target and Serve the Private Pay Consumers” Royal Suite
A-11 “Solutions for Senior Hunger” Plaza 2
C-6 “Communicating with Diverse Populations” Westchester
D-6 “Overview of the Texas Disaster Volunteer Registry” West Alabama
E-6 “Policies and Practices of Cooperative Relationships” Tanglewood
F-6 “Access to VA Benefits” Post Oak
G-7 “What Makes a Good Public I&R Website?” Plaza 1
H-6 “Merging I&R Databases Using the AIRS XSD” San Felipe
J-6 “211 Assembly” Imperial Suite
K-6 “Innovation by Collaboration: Chicago’s Homelessness Prevention Call Center” Bellaire

Session 7 – Wednesday, May 21, 2008
9:00 am – 10:30 am
A-12 “Empowering Older Consumers and Caregivers Toward Greater Economic Security” Royal Suite
C-7 “It All Starts with Attitude” Westchester
D-7 “Coordinated Assistance Network Strategic Initiatives” West Alabama
E-7 “ABCs of Satisfaction & Impact Surveys” Tanglewood
F-7 “Military Spouse Career Advancement Accounts” Post Oak
G-8 “Public-Private Data Sharing Initiatives that Improve I&R for Everyone” Plaza 1
H-7 “Managing Technology in a Disaster” San Felipe
J-7 “Help us Shape 211 US” Imperial Suite
K-7 “Growing a Program” Bellaire

Session 8 – Wednesday, May 21, 2008
10:45 am – 12:15 pm
C-8 “Suicide/Lethality Assessment for I&R” Royal Suite
D-8 “Relationships and Resources: Fostering Effective Interactions between the Local Emergency Operations Center and 211 in a Community Disaster” Westchester
E-8 “Why People Volunteer and Why They Don’t: Understanding Today’s Volunteers” (Part 1) West Alabama

Session 9 – Wednesday, May 21, 2008
2:15 pm – 3:45 pm
C-9 “Abusive and Manipulative Sex Callers” Plaza 2
D-9 “AIRS/UWA National Disaster Response Team: What to Expect when Disaster Strikes” Imperial Suite
E-9 “Why People Volunteer and Why They Don’t: Understanding Today’s Volunteers” (Part 2) West Alabama
F-9 “Just in Time Family Life Education” San Felipe
H-9 “Introduction to Telecommunication Equipment: PBX, ACD, IVR, CMS, CAS and Workforce Management” Westchester
K-10 “Lasso Your Data: Collecting Data for Evaluation Follow-Up, Crisis, Advocacy and Unmet Needs to Help You Hog Tie Accreditation” Post Oak
Workshops by Tracks and Descriptions

(A) Aging And Disability Track

Monday, May 19
10:00 am – 11:30 am
Royal Suite
A-1 “National Initiatives, Trends and Resources in Aging and Disability I&R”
This session will provide an overview of federal initiatives, along with national and local trends of interest to aging information and referral service delivery systems and ADRCs. Representatives from the U.S. Administration on Aging, the National Association of Area Agencies on Aging, and the National Association of State Units on Aging will discuss new directions for the Eldercare Locator, current federal projects, and their implication for aging I&R/As. Participants will hear about training and technical assistance resources designed to enhance the quality of service delivery and foster professionalism of aging and disability information and referral.

Presenters: Sherri Clark, Aging Program Specialist, Center for Communication & Consumer Services, U.S. Administration on Aging, Washington, DC; Sandra Reynolds, Manager, Eldercare Locator, National Association of Area Agencies on Aging, Washington, DC; Bernice Hutchinson, Director, Consumer Information, Outreach and Assistance, National Association of State Units on Aging, Washington, DC

Monday, May 19
10:00 am – 11:30 am
Plaza 2
A-2 “Securing the Economic Stimulus Package for Aging and Disabled Clients”
To help spur a slowing economy, the IRS will send economic stimulus checks to over 130 million households beginning in May 2008 and continuing through the remainder of 2008. Up to 24 million Americans who rely primarily on Social Security income qualify for a stimulus check. This session will enable you to learn what you need to know to help your clients get this payment from the IRS. You will learn who is eligible, the seven simple steps for completing the tax return, and how receipt of the Economic Tax Payment affects their eligibility for Medicaid, Food Stamps and Section 8. Arkansas will share its experience with developing new policy, new partnerships and innovative outreach for advocacy.

Presenters: Hilary Sohmer Dalin, Associate Director, My Medicare Matters, National Council on Aging, Washington, DC; Kathie J. Gately, BSW, State Long Term Care Ombudsman, Arkansas Division of Aging and Adult Services, Little Rock, AR

Monday, May 19
1:00 pm – 2:30 pm
Royal Suite
A-3 “Cash and Counseling: A Successful Model in Consumer Choice”
As the need for community based long term care services continues to grow for older adults and persons with disabilities, innovative concepts, and creative solutions are designed, tested, and replicated. The Cash and Counseling Program is a highly successful model that provides a monthly Medicaid funded allowance to beneficiaries who are empowered to manage decisions about and payment for personal home health care, caregiver, and community supports. This session will provide an overview of the program, from one of the original demonstration states, and lessons learned about consumer choice, health related outcomes, and consumer satisfaction. Presenters will share implications for enhancing the information and referral and ADRC experience.

Presenters: William A. B. Ditto, Director, Division of Disability Services, New Jersey Department of Human Services, Trenton, NJ

Monday, May 19
1:00 pm – 2:30 pm
Plaza 2
A-4 “Successful Service Delivery, Successful Partnership: Bridging the Gap Between Aging and Disability I & R/A Systems”
Participants will learn approaches to building a collaborative information and referral service delivery system between the aging and disability networks. The Texas ADRC and Alamo Service Connections staff will discuss partnership strategies, differences in their local Aging and Disability information and referral systems, and how these systems were brought together under the Aging and Disability Resource Center grant to form a cohesive model of aging information and referral service delivery in Bexar County.

Presenters: Leslie Swann, ADRC Program Officer, U.S. Administration on Aging, Washington, DC; Ray Helmcamp, Director, Mental Retardation Services, Central Counties Mental Health and Mental Retardation, Temple, TX; Martha Ramirez, Access and Assistance Coordinator, Bexar Area Agency on Aging, San Antonio, TX

Monday, May 19
3:15 pm – 4:45 pm
Royal Suite
A-5 “Creating Livable Communities for All Ages: What Does This Mean for I&R?”
The population is aging rapidly. Communities across the
nation are experiencing unprecedented growth and new interest as older adults and persons with disabilities are choosing to remain in their homes or return to communities from institutional settings. Are our communities prepared? What does a livable community mean for consumers and a quality information and referral experience? This workshop will highlight best practices and discuss resources that can help older adults and communities work together to make our communities good places in which to group up and grow old.

**Presenter:** Helen Eltzeroth, Deputy Director, Programs and Communications, National Association of Area Agencies on Aging, Washington, DC

**Monday, May 19**
3:15 pm – 4:45 pm
Plaza 2
A-6 “It Takes a Village: Maximizing I&R Resources for Benefits Outreach and Enrollment through Community Mapping and Effective Partnership”
Information and referral professionals are an integral part of connecting seniors who have limited incomes to benefits. This session will help I&Rs learn how to maximize resources for benefits outreach and enrollment through a process of community mapping. Participants will discuss how to determine the right partners for benefits outreach and enrollment efforts, and how to engage partners to yield positive results. Learn from real-life experiences of a local aging organization in building strong partnerships for enrolling people in benefits.

**Presenters:** Marisa Scala-Foley, Associate Director of the Access to Benefits Coalition, National Council on Aging, Washington, DC; Jane E. Fumich, Director, Cleveland Department of Aging, Cleveland, OH

**Tuesday, May 20**
8:30 am – 10:00 am
Royal Suite
A-7 “Making the Transition from I&A to ADRC: Assessing Readiness for Change”
Participants will engage in a hands-on exercise that will demonstrate the characteristics, content, and functions of a web based ADRC Readiness Assessment Survey. This online, self administered survey was developed to assist Information and Assistance and 211s evaluate their capacity to take on roles as ADRCs or as formal partners with ADRC programs. The readiness assessment tool is convenient, easy to use, and provides immediate feedback about an organization’s readiness to transition to ADRC. In addition to participating in the readiness assessment demonstration, participants will hear from representatives of two information and referral programs that have transitioned to ADRCs. The presenters will share their transition experiences and answer participants’ questions.

**Presenters:** Barbara Ettner, Senior Associate, The Lewin Group, Falls Church, VA; Lynda Southard, Information Specialist, Cajun Area Agency on Aging, Lafayette, LA; Lynnda Bassham, Director of Human Services, Lower Savannah Council of Governments, Aiken, SC

**Tuesday, May 20**
10:30 am – 12:00 pm
Royal Suite
A-8 “How to Locate and Use Services for Seniors with Vision Loss”
Services for older individuals with vision loss are a well kept secret. The American Foundation for the Blind has created a unique web resource with a searchable national database for services and information available for seniors and family members. This workshop will demonstrate the site and specific ways information and referral professionals can seek new partnerships to improve the referral process, populate resource databases, improve training, and better serve this important consumer group.

**Presenter:** Priscilla Rogers, Program Manager, Senior Site and Independent Living, American Foundation for the Blind, Dallas, TX
**Tuesday, May 20**

**10:30 am – 12:00 pm**  
**Plaza 2**  
**A-9 “Creating Policies and Procedures for Your Aging Organization”**

Representatives from the New Hampshire Bureau of Elderly and Adult Services will discuss the development and implementation of three new policies (unmet needs, grievance, and inclusion/exclusion) relating to the management of the states aging network. Discussion will include statewide network systems development, local policies, and integrating the sometimes competing needs of the state program and the local network members.

**Presenters:** Jennifer Hosue, Program Coordinator, ServiceLink, State of New Hampshire Bureau of Elderly and Adult Services, Concord, NH; Wendi Aultman, Program Manager, ServiceLink, State of New Hampshire Bureau of Elderly and Adult Services, Concord, NH; Beth Benson, Resource Manager, ServiceLink, State of New Hampshire Bureau of Elderly and Adult Services, Concord, NH

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**Tuesday, May 20**

**2:15 pm – 3:45 pm**  
**Royal Suite**  
**A-10 “Creative Strategies to Target and Serve the Private Pay Consumers”**

“Older Americans Act” programs have always been available to individuals of all income levels. However, with the advent of the Choices Initiative and, in particular, Aging and Disability Resource Centers (ADRCs), some states actively target consumers who have the means to pay for long term care services and supports. This session will focus on targeting private pay consumers and the strategies to attract this population to the ADRC for information and resources on long term care support options. Resources that meet this population’s need will be detailed and participants will walk away with a “mini starter kit.” The ADRC Technical Assistance Exchange and grantee states actively engaged in serving private pay consumers will facilitate this session.

**Presenter:** Christina Neill Bowen, Consultant, The Lewin Group, Falls Church, VA

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**Tuesday, May 20**

**2:15 pm – 3:45 pm**  
**Plaza 2**  
**A-11 “Solutions for Senior Hunger”**

Access to adequate, safe, and healthy food is essential if older adults are to remain independent in the community. Learn about the relationship between nutrition, health, functionality, food insecurity, and federal programs to address this need. Learn about how Federal nutrition assistance programs work collaboratively to increase access for older adults.

**Presenters:** Jean L. Lloyd, National Nutritionist, Center for Program Operations, U.S. Administration on Aging, Department of Health and Human Services; Karen Walker, Director, Program Accountability Office, Food and Nutrition Services, United States Department of Agriculture

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**Wednesday, May 21**

**9:00 am – 10:30 am**  
**Royal Suite**  
**A-12 “Empowering Older Consumers and Caregivers Toward Greater Economic Security”**

Millions of older Americans, persons with disabilities, and caregivers are eligible for programs that help cover basic health and living expenses and may not know it! Online strategies and tools have been designed for comprehensive screening for major public benefits; state specific data, laws, and supportive programs grandparents can turn to for help while raising grandchildren; assessment systems that assist older workers in finding employment and polishing job skills; and tax consultation 24/7 with online counselors. Participants will learn about these powerful tools and how consumers can become empowered through their information and referral encounters.

**Presenters:** Matthew McCloy, Director of Economic Security Work Programs, AARP Foundation, Washington, DC; Maggie Biscarr, National Program Consultant, Economic Security Work Programs, AARP Foundation, Washington, DC

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**Wednesday, May 21**

**9:00 am – 10:30 am**  
**Plaza 2**  

Options Counseling is an interactive decision support process whereby consumers, family members and/or significant others are supported in their deliberations to determine appropriate long term care choices in the context of the consumer’s needs, preferences, values, and individual circumstances. Promoting informed decisions about long-term care and supports, through options counseling, is a major goal of Aging and Disability Resource Centers (ADRCs). This session will focus on discussing the 5 W’s of options counseling: Who delivers options counseling; What protocols are followed; When does it occur; Where does it occur; and Why is it important and important to track. The session will include an overview by the ADRC Technical Assistance Exchange and discussion from selected ADRC states providing options counseling.

**Presenters:** Christina Neill Bowen, Consultant, The Lewin Group, Falls Church, VA; Gilbert Thompson, Senior Associate, The Lewin Group, Falls Church, VA
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Monday, May 19
10:00 am – 11:30 am
Westchester
C-1 “Quiz Show Questioning”
To Tell the Truth, I’ve Got a Secret, and you have to guess What’s My Line. Using techniques employed on the game shows of old learn how to keep your caller out of Jeopardy while helping them find what they need in The Match Game of life.

Presenter: Francie Kranzberg, Jewish Information & Referral Service of Washington DC

Monday, May 19
1:00 pm – 2:30 pm
Westchester
C-2 “Happy Trails: Working with Difficult Interactions”
Most of the time our days at work are just like the Beach Boys song; we get ‘good vibrations’ that give us ‘excitations’. However, there are those times when the good vibrations suffer a wipeout. There are certain callers and situations that affect us negatively. Ignoring the existence of such circumstances is not conducive to quality I&R provision. It can also exacerbate staff effectiveness as well as burnout. We will look at what we “control” in such interactions and how to leverage that control into something that will empower us to work “with” these situations instead of feeling victimized by them. To accomplish this, we will introduce the concept that difficult interactions happen but they don’t have to ruin our “Happy Trails”; identify individuals, situations, and behaviors that make for difficult interactions; examine what exactly it is that makes these interactions difficult; discuss the need to deal with such situations assertively not punitively; develop strategies, methodologies, and policies to mitigate the impact of such interactions by adapting current skills and introducing new skills. This session is intended to be informative, fun and have you leaving singing: Happy trails to you!

Presenter: John Plonski, Covenant House Nineline

Monday, May 19
3:15 pm – 4:45 pm
Westchester
C-3 “Food, Shelter, Suicide: What’s An I&R Specialist To Do! Crisis Intervention and the AIRS Standards”
Participants will be given a brief overview of the AIRS Crisis Intervention Standard. In addition, participants will be introduced to crisis theory, principles of crisis management, basic suicidology including lethality assessment, and more! If you are new to crisis intervention (your program generally handles I&R only), or need a good refresher, this workshop is for you!

Presenter: Perla Martinez, Switchboard of Miami

Tuesday, May 20
8:30 am – 10:00 am
Westchester
C-4 “When the West Gets Wild: Crisis Intervention for I&R” (Part 1)
Just because you work at an I&R doesn’t mean you won’t get crisis calls. It is the intent of this two-part workshop to provide the basic tools to assess and meet the immediate short-term needs of the inquirer in crisis by expanding on listening skills you already know. The first part this workshop will discuss the reasons for learning the basics of crisis intervention, define crisis and the nature of the continuum of crisis as it relates to the normal state and coping, and the basics of client centered crisis intervention.

Presenter: John Plonski, Covenant House Nineline

Tuesday, May 20
10:30 am – 12:00 pm
Westchester
C-5 “When the West Gets Wild: Crisis Intervention for I&R” (Part 2)
Just because you work at an I&R doesn’t mean you won’t get crisis calls. It is the intent of this two-part workshop to provide the basic tools to assess and meet the immediate short-term needs of the inquirer in crisis by expanding on listening skills you already know. The second part will introduce a basic Crisis Intervention Model with a demonstration of how it can work, an examination of the Do’s and Don’ts of crisis intervention, and a discussion of immediacy assessment protocols.

Presenter: John Plonski, Covenant House Nineline

Tuesday, May 20
2:15 pm – 3:45 pm
Westchester
C-6 “Communicating with Diverse Populations”
Major concepts of the workshop include: What is Cultural Competency, Why Focus on Cultural Diversity, Continuum of Competence, Factors the Impact the extent to which diverse cultures interact with existing cultures, Elements of Culture, Ethnic and Cultural Stumbling Blocks, Counselor’s Awareness of Own Assumptions, Values and Biases, Barriers to Services, Reaching and Meeting the Needs of the Elderly, Mental Health Services and the Elderly.

Presenter: Perla Martinez, Switchboard of Miami

Wednesday, May 21
9:00 am – 10:30 am
Westchester
C-7 “It All Starts with Attitude”
The single biggest difference between an effective I&R Specialist and an ineffective one is attitude. You may have
all the knowledge and skills but if you have a poor attitude you will never succeed as an I&R Specialist. This interactive session will outline strategies for overcoming a negative attitude. Audio-clips and a video entitled “When You Can’t Say Yes” demonstrate and reinforce the importance attitude plays in the field of I&R.

**Presenter:** Faed Hendry, Findhelp Information Services

**Wednesday, May 21**
**10:45 am – 12:15 pm**
**Royal Suite**
C-8 “Suicide/Lethality Assessment for I&R”
A suicidal person like any person in crisis, by definition, a person faced with an intolerable life issue for which they are seeking a solution. Suicidal activity is both a means for resolving this life issue and a method of communicating the intense feelings of hopelessness and helplessness surrounding it. In this workshop you will learn how to identify the caller who may be suicidal, establish a trusting relationship, assess the suicidal potential, and formulate a plan and mobilize resources.

**Presenter:** John Plonski, Covenant House Nineline

**Wednesday, May 21**
**2:15 pm – 3:45 pm**
**Plaza 2**
C-9 “Abusive and Manipulative Sex Callers”
Manipulative sex calls happen on I&R hotlines more often than you can imagine! Protect your staff and hotlines. Learn how to manage manipulative sex calls from CrisisLink which has operated a crisis intervention, suicide prevention and information and referral hotline for nearly 40 years.

**Presenter:** Jamie L. Carter, CrisisLink

**D) Disaster Track**

**Monday, May 19**
**10:00 am – 11:30 am**
**Imperial Suite**
D-1 “Disaster Preparedness and Response: So you think that you are ready?” (Part 1)
A panel discussion of the 211 San Diego experience in the 2007 wildfires from the perspectives of the CEO; Phone Center Director and Emergency Manager; followed by a disaster preparedness workshop with tools, real world “do’s and don’ts” and their application in meeting Area VI of AIRS Accreditation Standards.

**Presenters:** John Ohanian, 211 San Diego; Mona Freels, 211 San Diego; William Norris, Norris Associates

**Monday, May 19**
**1:00 pm – 2:30 pm**
**Imperial Suite**
D-2 “Disaster Preparedness and Response: So you think that you are ready?” (Part 2)
A panel discussion of the 211 San Diego experience in the 2007 wildfires from the perspectives of the CEO; Phone Center Director and Emergency Manager; followed by a disaster preparedness workshop with tools, real world “do’s and don’ts” and their application in meeting Area VI of AIRS Accreditation Standards.

**Presenters:** John Ohanian, 211 San Diego; Mona Freels, 211 San Diego; William Norris, Norris Associates
Monday, May 19  
3:15 pm – 4:45 pm  
West Alabama  
D-3 “FEMA and I&R”  
Learn about how FEMA operates during disasters and how the I&R sector can best perform its roles.  
**Presenter:** Ken Curtin, Voluntary Agency Liaison, FEMA Region II

Tuesday, May 20  
8:30 am – 10:00 am  
West Alabama  
D-4 “211 Data Analysis of Hurricanes Katrina & Rita Disaster Needs”  
Using the wealth of information that was collected in Texas by the 25 211 Centers during Hurricanes Katrina and Rita, a data analysis study was completed. This analysis has served as a planning tool for the State of Texas for future emergency and disasters. Data collection methods for coding 211 disaster calls, lessons learned, and key findings of community needs for Katrina/Rita will be discussed.  
**Presenters:** Kay Parker, United Way of the Brazos Valley/211 Brazos Valley; Dr Sherry Bame, Texas A&M University/Health & Community Planning

Tuesday, May 20  
10:30 am – 12:00 pm  
West Alabama  
D-5 “Community Collaboration for Disaster Related Case Management”  
A disaster of epic proportions like Hurricane Katrina can leave a community scrambling to provide services in the aftermath. This workshop will share experiences of VIA LINK 211 efforts to provide clients affected by the disaster a simple access point into the long-term disaster related case management system through collaborations with National Disaster recovery organizations and local case management agencies.  
**Presenters:** Shari Sinwelski, VIA LINK; Francesca Scagnelli, VIA LINK

Tuesday, May 20  
2:15 pm – 3:45 pm  
West Alabama  
D-6 “Overview of the Texas Disaster Volunteer Registry”  
The Texas Department of State Health Services, per Federal requirements from the Office of the Assistant Secretary for Preparedness and Response (OASPR), has established the Texas Disaster Volunteer Registry, a statewide volunteer database that will provide local jurisdictions and emergency management coordinators with a Web-based tool to register and manage medical/healthcare professionals and lay individuals during a disaster response. This workshop will provide an overview of the Registry's purpose and functions and will provide I&R professionals with the information and resources needed to inform Texans about the Registry via 211 Texas I&R Network.  
**Presenter:** Belinda Hare, Texas Department of State Health Services

Wednesday, May 21  
9:00 am – 10:30 am  
West Alabama  
D-7 “Coordinated Assistance Network Strategic Initiatives”  
This workshop will outline the evolving role of 211’s from a disaster preparedness, relief and recovery standpoint. We will review examples of different ways 211’s have integrated into the planning process from the CAN pilot communities and the relief and recovery process from the communities where CAN has been deployed (San Diego and New Orleans). Additionally we will present a shared vision with tools and processes for 211’s to become more active with the local VOAD groups.  
**Presenter:** Liz Bowen, Coordinated Assistance Network

Wednesday, May 21  
10:45 am – 12:15 pm  
Westchester  
D-8 “Relationships and Resources: Fostering Effective Interactions between the Local Emergency Operations Center and 211 in a Community Disaster”  
Using examples from the December 2007 Oklahoma ice storm and massive power outage, this workshop will empower 211 call centers to engage in a proactive process of developing relationships with their local disaster response community prior to disasters and to leverage those relationships to ensure positive collaboration during a disaster.  
**Presenter:** Jessica Hill, 211 Helpline

Wednesday, May 21  
2:15 pm – 3:45 pm  
Imperial Suite  
D-9 “AIRS/UWA National Disaster Response Team: What to Expect when Disaster Strikes”  
Disaster preparedness, response & recovery have become an important part of all of our jobs. As someone once said, “It’s not if a disaster will strike, it’s when.” Disaster can take many forms in our communities and as Information & Referral Centers and 211 Centers prepare disaster plans they need to be knowledgeable about the AIRS/UWA Disaster Response Team, what this team can offer when called upon and the criteria for deployment. Discussion will also take place around implementing state disaster response teams and how AIRS/UWA DRT can assist with the implementation.  
**Presenters:** Charlene Hipes, AIRS; Larry Olness, Heart of Florida United Way; Trish Ferrell, United Way of Greater Richmond & Petersburg
(E) Management Track

Monday, May 19
10:00 am – 11:30 am
West Alabama
E-1 “Principles of Legislative Advocacy”
This session will focus on the ongoing I&R public policy agenda and the kind of advocacy needed to advance it.

Monday, May 19
1:00 pm – 2:30 pm
Tanglewood
E-2 “Call Monitoring: Moving from Meeting Funding Requirements to Exceeding the Caller’s Expectations” (Part 1)
A science-based method for developing call monitoring tools will be presented. Examples of how it was tailored for two different purposes will be shared. Participants will learn the steps necessary to develop their own measure for call monitoring that can meet both funder expectations and broader I&R standards.
Presenters: Amy Latzer, 211 LA County; Cesar Ponciano, 211 LA County; Dr. Elizabeth Harris, Evaluation, Management & Training Associates, Inc.

Monday, May 19
3:15 pm – 4:45 pm
Tanglewood
E-3 “Call Monitoring: Moving from Meeting Funding Requirements to Exceeding the Caller’s Expectations” (Part 2)
A science-based method for developing call monitoring tools will be presented. Examples of how it was tailored for two different purposes will be shared. Participants will learn the steps necessary to develop their own measure for call monitoring that can meet both funder expectations and broader I&R standards.
Presenters: Amy Latzer, 211 LA County; Cesar Ponciano, 211 LA County; Dr. Elizabeth Harris, Evaluation, Management & Training Associates, Inc.

Tuesday, May 20
10:30 am – 12:00 pm
Plaza 1
E-5 “Applying Quality Assurance Tools in an I&R Program”
An overview of quality assurance tools utilized by I&R programs including program effectiveness follow-up, silent call monitoring, call accounting data and some less common measurements like agency satisfaction feedback and key result areas. A review of the instruments, process, measurements and how the tools are utilized to strengthen I&R services. Participants will be provided an opportunity to analyze quality assurance data and identify steps or solutions to problems identified.
Presenter: Bob McKown, Heart of West Michigan United Way

Tuesday, May 20
2:15 pm – 3:45 pm
Tanglewood
E-6 “Policies and Practices of Cooperative Relationships”
We will shine a light on the sometimes scary world of cooperative relationships across all sectors of the community public, private, faith-based, governmental. We all have reasons to work together, and we all have barriers to the success of these relationships. We’ll share proven strategies and insights for participants to take away and implement in their own partnerships.
Presenter: Mary Cooksey, United Way of Abilene
**Wednesday, May 21**

9:00 am – 10:30 am

**Tanglewood**

E-7 “ABCs of Satisfaction & Impact Surveys”

A science-based method for developing surveys will be presented. Examples of telephone and Internet satisfaction surveys will be presented, as well as telephone outcome surveys. Participants will learn the steps necessary to develop surveys tailored to meet their needs.

**Presenter:** Dr. Elizabeth Harris, Evaluation, Management & Training Associates, Inc.

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**Wednesday, May 21**

10:45 am – 12:15 pm

**West Alabama**

E-8 “Why People Volunteer and Why They Don’t: Understanding Today’s Volunteers” (Part 1)

Maybe your organization has finally decided that you will need some help from volunteers to get all of that work done in your I&R. Or, maybe you already use volunteers, but with limited success. The first step toward successful recruitment and retention of the right volunteers for your I&R is to understand what motivates people to volunteer and what role the differences in the generations play in the value systems and work ethic of volunteers. Volunteers are selective about where they give their most priceless gift, their time. This workshop generates lots of lively discussion. Leave with a better understanding of the people you interact with and of yourself! Participants will learn some practical tips for meeting volunteers’ expectations and suggestions for recognition activities that will be meaningful for their volunteers.

**Presenter:** Vickie Bateman, Volunteer Action Center of Bartholomew County

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**Wednesday, May 21**

2:15 pm – 3:45 pm

**West Alabama**

E-9 “Why People Volunteer and Why They Don’t: Understanding Today’s Volunteers” (Part 2)

Maybe your organization has finally decided that you will need some help from volunteers to get all of that work done in your I&R. Or, maybe you already use volunteers, but with limited success. The first step toward successful recruitment and retention of the right volunteers for your I&R is to understand what motivates people to volunteer and what role the differences in the generations play in the value systems and work ethic of volunteers. Volunteers are selective about where they give their most priceless gift, their time. This workshop generates lots of lively discussion. Leave with a better understanding of the people you interact with and of yourself! Participants will learn some practical tips for meeting volunteers’ expectations and suggestions for recognition activities that will be meaningful for their volunteers.

**Presenter:** Vickie Bateman, Volunteer Action Center of Bartholomew County

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**Monday, May 19**

10:00 am – 11:30 am

**Post Oak**

F-1 “What’s it All About? Work-Life Balance in One Hour”

A fun filled but serious workshop to encourage I&R Specialists to determine the skill sets they bring to their job and what they provide their employers; to better organize their time and talent; to better assess their tasks and goals and put them in perspective in their lives.

**Presenter:** Jerry Lewis, Quality of Life Coordinator, 4th MCD (retired), Vice U.S. Marine Corps (retired)

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**Monday, May 19**

1:00 pm – 2:30 pm

**Post Oak**

F-2 “Home from the War: Where Can I Get The Help I Need?”

The trauma of military creates consequences that are manifested over time in families, jobs, and communities. The consequences of trauma have long been shown to create secondary impacts. Texas is implementing a way to address the needs of military service members, veterans and their families through information and referral about available resources and services.

**Presenters:** Beth Wick, 211 Texas Information & Referral Network; Dr. Kathryn J. Kotrla, Texas A&M Health Science Center College of Medicine

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**Monday, May 19**

3:15 pm – 4:45 pm

**Post Oak**

F-3 “Marine Corps Breakout Session”

The Marine Corps Program Manager will meet with participants to discuss unique I&R issues. Members of the other military services are welcome to attend.

**Presenter:** Kim Gates, Marine Corps Family Team Building

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**Tuesday, May 20**

8:30 am – 10:00 am

**Post Oak**

F-4 “The Four Lenses” (Part 1)

The Four Lenses is a temperament intelligence assessment that helps participants discover there are differences among people in the areas of perception and perspective, which can be categorized in terms of a personality type. This information can then be applied to the participant’s life, both professionally and personally to enhance their communication skills. Part One of this interactive 2 part workshop, allows participants to learn about various personality types and features a self assessment of personality using the Four Lenses.

**Presenters:** Kim Gates, Marine Corps Family Team Building;
Mary Driscoll, Quality of Life Coordinator from the 1st Marine Corps District, Craig Sproul, Quality of Life Coordinator from the 6th Marine Corps District; Gloria Bryant, Quality of Life Coordinator from the 8th Marine Corps District; Dave Gutierrez, Quality of Life Coordinator from the 9th Marine Corps District; Dan Dean, Quality of Life Coordinator from the 12th Marine Corps District

Tuesday, May 20
10:30 am – 12:00 pm
Post Oak
F-5 “The Four Lenses” (Part 2)
The Four Lenses is a temperament intelligence assessment that helps participants discover that there are differences among people in the areas of perception and perspective, which can be categorized in terms of a personality type. This information can then be applied to the participant’s life, both professionally and personally to enhance their communication skills. Part Two of this interactive 2 part workshop integrates the powerful competencies of Emotional Intelligence with Four Lenses (personality assessment), into a learning environment that fosters intrinsic learning for long-term results!

Presenters: Kim Gates, Marine Corps Family Team Building; Mary Driscoll, Quality of Life Coordinator from the 1st Marine Corps District, Craig Sproul, Quality of Life Coordinator from the 6th Marine Corps District; Gloria Bryant, Quality of Life Coordinator from the 8th Marine Corps District; Dave Gutierrez, Quality of Life Coordinator from the 9th Marine Corps District; Dan Dean, Quality of Life Coordinator from the 12th Marine Corps District

Tuesday, May 20
2:15 pm – 3:45 pm
Post Oak
F-6 “Access to VA Benefits”
Of the 25 million veterans currently alive, nearly three of every four served during a war or an official period of hostility. About a quarter of the nation’s population are potentially eligible for VA benefits and services because they are veterans, family members or survivors of veterans.
In this workshop, you will learn to identify basic eligibility requirements for Department of Veterans Affairs benefits, and be able to properly refer veterans to these benefits.

Presenters: Fern A. Taylor, Michael E. DeBakey VA Medical Center; Larry C. Meador Jr., Operation Enduring Freedom/Operation Iraqi Freedom Program Manager, Department of Veterans Affairs; William Chick, Houston Veterans Center

Wednesday, May 21
9:00 am – 10:30 am
Post Oak
F-7 “Military Spouse Career Advancement Accounts”
Participants of this workshop will receive the necessary information regarding the Department of Labor/Department of Defense initiative that is the Career Advancement Account, verify eligibility, and establish the account for the spouse through the Department of Labor. Program criteria, parameters and eligibility will be discussed as well as service delivery for execution of the program at individual installations.

Presenter: Corrina Brennan, Marine & Family Services, Readiness and Community Support, Family Member EAP

Wednesday, May 21
10:45 am – 12:15 pm
Imperial Suite
F-8 “An Enduring Commitment: Transitioning Family Readiness Programs in the Marine Corps”
Understanding the stressors of multiple sustained combat deployments, and upholding its enduring commitment to its families, the Marine Corps has taken advantage of an unprecedented opportunity to transition its Family Readiness Programs. Learn how the Marine Corps is coordinating its Family Readiness efforts to better meet the changing needs of its families.

Presenter: Kim Gates, Marine Corps Family Team Building

(G) Resource Database Track

Monday, May 19
10:00 am – 11:30 am
Plaza 1
G-1 “Successful Recruitment and Legitimization of Non-profit & For-profit Agencies to your Database”
Workshop participants will learn how to strategically build a resource database and identify recruitment strategies. Sample database application forms, inclusion/exclusion criteria, and acceptance/rejection letters will be shared, as well as the reapplication process if an agency is denied inclusion. In addition, participates will understand the importance of how to conduct successful site visits as a means to legitimize services and ultimately decrease caller complaints. Last, participants will recognize strategies to recruit appropriate
for-profit organizations that pay a fee to be included in the
database in an effort to increase revenues.

**Presenter:** Neese Blackshear-Cobb, United Way of Metro
Atlanta 211

**Monday, May 19**
1:00 pm – 2:30 pm
Plaza 1
G-2 “Taxonomy Website Tour”
Take a guided tour of the upgraded Taxonomy website
conducted by taxonomy developer and editor, Georgia Sales.
See the new U.S. and Canadian versions, filter creation and
custom report functions and other new features as well as
state-of-the-art search functionality, print options, up-to-the
minute information about changes and additions and the
process for downloading the XML file for updating purposes
as well as the growing resource library and other supporting
materials. You can ask questions, make comments and share
your wish list for future upgrades.

**Presenter:** Georgia Sales, 211 LA County

**Monday, May 19**
3:15 pm – 4:45 pm
Plaza 1
G-3 “Delivering Human Service Information on the Internet:
A Scan of Practices in America’s Ten Largest Cities”
The Internet is an increasingly important delivery channel for
human service information across America. This workshop
reviews our newly-completed study of Internet human service
information delivery in America’s ten largest cities, highlighting
key challenges, significant delivery techniques, and emerging
good practices. Challenges specific to I&R online directories
will be discussed.

**Presenter:** Mark Neuffer, Integer Research & Consulting, LLC

**Tuesday, May 20**
8:30 am – 10:00 am
Plaza 1
G-4 “Disaster Knowledgebase with 211Texas.org”
The 211Texas.org disaster knowledgebase will be
demonstrated, and we will show it was able to effectively serve
during disasters, and how we expect it to scale well for any
future disasters. We will also talk about how other states can
take advantage of the work 211Texas.org has already done.

**Presenters:** Carolyn Counterman, 211 Texas Information and
Referral Network; Jeff Sumner, 211 Texas Information and
Referral Network; Srinivas Muthyala, 211 Texas Information
and Referral Network

**Tuesday, May 20**
8:30 am – 10:00 am
Imperial Suite
G-5 “Indexing Using the AIRS/Info Line Taxonomy of
Human Services” (Part 1)

This workshop provides a practical instruction in how to use
the AIRS/INFO Line Taxonomy. Topics include a review
of the Taxonomy’s design features, basic indexing principles,
step-by-step guidelines for indexing with the Taxonomy,
and suggestions for customizing the Taxonomy to meet the
unique needs of an organization. Participants will also have an
opportunity to practice indexing.

**Presenter:** Dick Manikowski, Detroit Public Library, TIP
Service

**Tuesday, May 20**
10:30 am – 12:00 pm
Imperial Suite
G-6 “Indexing Using the AIRS/Info Line Taxonomy of
Human Services” (Part 2)
Building upon the introductory information presented in the
first half of this two-part program, this second part will lead
participants through practical exercises in using the Taxonomy
to index resources and discuss what’s involved in keeping an
agency’s Taxonomy up to date.

**Presenter:** Dick Manikowski, Detroit Public Library, TIP
Service

**Tuesday, May 20**
2:15 pm – 3:45 pm
Plaza 1
G-7 “What Makes a Good Public I&R Website?”
Putting together a database that meets the needs of trained
I&R Specialists but that also translates well into an online
database that the general public can easily use is a real challenge.
The panelists for this presentation all maintain public websites
that include both comprehensive and specialized I&R and
utilize the AIRS/InfoLine Taxonomy in some way. They will
talk about what has worked well and what has been problematic
on their websites. Join them for demonstrations, tips on how to
avoid pitfalls, and a question and answer period.

**Presenters:** Alicia Lee, United Way of Abilene/211 Texas A
Call for Help; Amy Price, 211, United Way Capital Area;
Carolyn Counterman, 211 Texas Information and Referral
Network; Kathleen McHarg, Multnomah County Aging &
Disability Services; Teresa Halverson, Great Rivers 211

**Wednesday, May 21**
9:00 am – 10:30 am
Plaza 1
G-8 “Public-Private Data Sharing Initiatives that Improve
I&R for Everyone”
This workshop will outline best practices in creating
community-wide data sharing partnerships for I&R. Practical
advice from successful initiatives in Pennsylvania and New
Jersey will be presented, helping participants understand
how to overcome the technical and political barriers to
creating effective collaborations that improve the quality of
every agency’s I&R services, reduce inefficiencies in the I&R
process and provide a greater level of self-sufficiency for individuals seeking help. Successful approaches to raising funds within your organization, from government agencies and the philanthropic community will be discussed, leaving participants with a roadmap for developing, implementing and funding a community-wide I&R data sharing initiative.

**Presenters:** John M Pierce, Allegheny County Department of Human Services; Josh Knauer, MAYA Design

***Wednesday, May 21***

**10:45 am – 12:15 pm**

**Post Oak**

**G-9 “Good Health Information is the Best Medicine”**

In addition to their call center database resources, I & R workers have access to premiere online health, disaster information and funding opportunities via the National Library of Medicine (NLM). Learn about evaluating credible online resources and finding local resources for health and disaster-related issues through the National Network of Libraries of Medicine (NN/LM).

**Presenters:** Adela Justice, Houston Academy of Medicine-Texas Medical Center Library; Cathy Burroughs, National Network of Libraries of Medicine, Pacific Northwest Region; Karen Vargas, National Network of Libraries of Medicine, South Central Region; Tom Page, Oregon 211

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### (H) Technology Track

**Monday, May 19**

**10:00 am – 11:30 am**

**San Felipe**

**H-1 “Telecommunication Equipment: It’s not about Technology, It’s about Service!”**

This workshop will look at an advanced look at various telecom technology such as ACD, voice mail, IVR Interactive Voice Response, CMS Call Management System, Call Recording, Workforce Management and Remote Agent and discuss how to apply it to operations to improve service.

**Presenters:** Amy Latzer, 211 LA County; Marianne Galleon, 211 LA County; Minh Dang, 211 LA County

**Monday, May 19**

**1:00 pm – 2:30 pm**

**San Felipe**

**H-2 “Sensible Computer Use: Minimizing Computer Health and Safety Risks”**

Like all technologies, computers have a dark side. This workshop will present practical information on various computer-related health and comfort issues and strategies for minimizing risk and maximizing comfort.

**Presenter:** Dick Manikowski, Detroit Public Library, TIP Service

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**Monday, May 19**

**3:15 pm – 4:45 pm**

**San Felipe**

**H-3 “Understaffed? Learn how to Optimize your Most Valuable Resource through Effective Scheduling”**

Learn how schedules aligned with need cut unnecessary costs, shift operational thinking from reactive to proactive, allow flexibility to changes, improve morale by balancing workload, and mitigate burnout and attrition.

**Presenter:** Minh Dang, 211 LA County

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**Tuesday, May 20**

**8:30 am – 10:00 am**

**San Felipe**


Web 2.0 is about the interactive nature of the internet as a platform. This introduction will provide an overview of a number of practical internet-based tools & resources, including hosted email, collaborative online word processing and spreadsheets, shared calendars, RSS feeds, blogs, twitters, custom search engines, social networks, social bookmarking and more. Also learn how to become an expert user of the AIRSNETWORKER Yahoo Groups!

**Presenters:** Joel Gluck, Champlain Valley Agency on Aging (CVAA); Tino Paz, United Way of America

**Tuesday, May 20**

**2:15 pm – 3:45 pm**

**San Felipe**

**H-6 “Merging I&R Databases Using the AIRS XSD”**

The AIRS XSD is the standard for I&R data exchange. This exciting panel will discuss the strategies, pitfalls, and successes that I&Rs have experiences in using the standard to share data.

**Presenters:** David Canavan, Canavan Associates; Eric Jahn, Alexandria Consulting LLC; Sumner, 211 Texas; Nancy Shank, University of Nebraska Public Policy Center
**Wednesday, May 21**

9:00 am – 10:30 am  
San Felipe  
H-7  “Managing Technology in a Disaster”  
If a disaster hit your agency could you still serve your community? This workshop will explore options for managing data and calls in the event of a disaster for your agency and neighboring communities.  

**Presenters:** Marianne Galleon, 211 LA County; Steve Parker, Active Strategies

10:45 am – 12:15 pm  
Plaza 2  
H-8  “Beyond Microsoft Outlook: Upgrading Your Email Management Response System”  
This workshop is designed to bring professional management standards to e-mail as part of information and referral service delivery. Participants will learn the basics of implementing a culture of planning (service levels, forecasts, staff requirements) as it applies to email, as well as the real-world adaptation of AIRS standards.  

**Presenter:** David Smith, Arizona 211

2:15 pm – 3:45 pm  
Westchester  
H-9  “Introduction to Telecommunication Equipment: PBX, ACD, IVR, CMS, CAS and Workforce Management”  
This session will provide an introduction to telecommunication equipment technology. Learn about what a PBX is and how it interrelates with ACD, voice mail, IVR Interactive Voice Response, CMS Call Management System, CAS Call Accounting System, Call Recording, Workforce Management and Remote Agent. If your agency is looking at telecom technology or if you would like to know how the each component functions this session will provide a basic understanding on each aspect to help you determine the value for your agency.  

**Presenter:** Marianne Galleon, 211 LA County

**J) 211 Track**

Monday, May 19  
10:00 am – 11:30 am  
Tanglewood  
J-1  “Transitioning 211 Boards from Founders to a Governance Model”  
This workshop is designed to help senior leaders dealing with board development and governance challenges to identify and develop strategies to manage board transitions, particularly focusing on the move from a founding board to a governance structure that can effectively address the needs and concerns of a broad group of stakeholders.  

**Presenters:** Brian Wagner; Tom Page, Oregon 211

Monday, May 19  
1:00 pm – 2:30 pm  
West Alabama  
J-2  “Developing Local and State Funding for Your Comprehensive I&R Service or System”  
Learn how to further your mission through community building, broaden and increase your funding base, and build long-term partnerships that solidify the permanency and effectiveness of your information and referral service or system.  

**Presenters:** Bill Brackin, Volunteers of America North Sound 211; Dennis Smith, United Way of Snohomish County

Monday, May 19  
3:15 pm – 4:45 pm  
Imperial Suite  
J-3  “Effective Public Policy for 211s”  
This workshop is geared toward the state or local 211 manager who is responsible for seeking funding. The presentation will offer an overview of the fundamentals for a public policy plan, lobbying 101, real-life examples of successes and trials with public policy efforts and how to frame an argument.  

**Presenters:** Lucinda Nord, Indiana Association of United Ways; Tom Page, Oregon 211

Tuesday, May 20  
8:30 am – 10:00 am  
Tanglewood  
J-4  “Give Help: The Forgotten Half of 211”  
This workshop will show you why providing volunteer referrals can benefit you as a 211 call center and your community. We will discuss practical strategies for incorporating volunteer referrals into your current organization and how to build relationships with volunteer centers in your service area that strengthen both organizations.  

**Presenter:** Kristen Pratt Canales, United Way of Utah County

Tuesday, May 20  
10:30 am – 12:00 pm  
Tanglewood  
J-5  “Engagement of State Government with 211 Coalition Building”  
Full engagement of state governments with respective statewide 211 coalitions is critical to systemic successes. With increasingly strained budgets and growing needs, state governments are in unique positions to facilitate expansive and inclusive dialogue to help manifest statewide I&R goals. This session will provide participants the opportunity to identify approaches to maximizing government partnerships.  

**Presenter:** Eric Ostermann, 211 Wisconsin
Tuesday, May 20
2:15 pm – 3:45 pm
Imperial Suite
J-6 “211 Assembly”
Now in its 6th year, the 211 Assembly provides an update and lively discussion about critical issues for the 211 field. Due to space limitations, participation may be limited to one representative from each active 211 Center. Hot topics expected for the 2008 Assembly include federal and state legislation, multi-state and national routing solutions, metrics, marketing and special promotion campaigns, 211 US, and more. All 211 Centers are encouraged to send one representative.

**Presenter:** Lucinda Nord, Indiana Association of United Ways; Tom Page, Oregon 211

Wednesday, May 21
9:00 am – 10:30 am
Imperial Suite
J-7 “Help us Shape 211 US”
211 US is a natural outgrowth of AIRS, UWA, 211 State Directors Association and 211 Leadership Council, which seek to ensure “211 is Excellent and Everywhere”. This workshop will share the results of the survey about 211 US and the planning work. Workshop participants can help shape the next phase of development. Participants will review the findings from the survey and other important 211 statistics (coverage, accreditation statistics, funding levels of 211, etc); discuss the strategic direction and work plan to date.

**Presenters:** Jamie Moore, AIRS President/United Way of the Midlands; Linda Daily, National 211 Director for United Way of America; Lucinda Nord, Indiana Association of United Ways; Tom Page, Oregon 211

Wednesday, May 21
10:45 am – 12:15 pm
San Felipe
J-8 “211 Centers: Doing it, The How of Metrics; What to Collect and How to Use it!”
Participants of this workshop should walk away with a clear plan on how to report and use the key performance metrics that they are gathering. They should be able to apply the techniques taught in the workshop to create reports and use the information to increase performance, quality, and production.

**Presenter:** Amy Latzer, 211 LA County

(K) Pot Pourri Track

Monday, May 19
10:00 am – 11:30 am
Bellaire
K-1 “Home from the War: Where Can I Get The Help I Need?”
The trauma of military creates consequences that are manifested over time in families, jobs, and communities. The consequences of trauma have long been shown to create secondary impacts. Texas is implementing a way to address the needs of military service members, veterans and their families through information and referral about available resources and services.

**Presenters:** Beth Wick, 211 Texas Information & Referral Network; Dr. Kathryn J. Kotrla, Texas A&M Health Science Center College of Medicine

Monday, May 19
1:00 pm – 2:30 pm
Bellaire
K-2 “Two, Four, Six, Eight, Who Do We Appreciate?”
Two, Four, Six, Eight, Who do YOU appreciate? I&R staff work hard and diligently to provide quality and accurate information each and every day. Although the work can be very rewarding, it can also have its stressful, challenging moments. I&R staff who feel appreciated are more creative, productive, and have increased performance on the job. Learn to build a stronger team, an appreciated team, who knows they are valued and recognized for their abilities. The end result is happier and motivated staff that will perform at the highest of standards.

**Presenters:** Kay Parker, United Way of the Brazos Valley; Traci Bryd, United Way of the Brazos Valley

Monday, May 19
3:15 pm – 4:45 pm
Imperial Suite
K-3 “Community Voice Mail and I&R: Working Together to Bridge the ‘Access to Information’ Gap”
Imagine trying to get a job or find housing without a phone number. Community Voice Mail (CVM) provides free voice mail to people in need in 40 U.S. cities. This workshop describes how I&R agencies partner with CVM to improve service delivery, increase the value of referrals, and create new community resources.

**Presenters:** Anna Landa, Community Voice Mail, National Office; Bill Brackin, Volunteers of America North Sound 211; Edward Perry, 211 Tampa Bay Cares
Tuesday, May 20
8:30 am – 10:00 am
Bellaire
K-4 "Assisting Military Families in Your Community”
Military family members often think of themselves more as civilians than "military”? Multiple deployments, and the activation of Reserve and National Guard members overseas presents new challenges for the military family members left behind. What do civilians need to know about military families and culture? What resources are available? What issues do families face? How can coordinated efforts between the military and civilian I&Rs positively impact on how well the family is able to cope while the member of the military is away?

Presenters: Doug Frank, Central Referral Service/211WNY; Kathleen Moakler, National Military Family Association; Linda Daily, United Way of America; Susan Richards, United Way Fox Cities

Tuesday, May 20
10:30 am – 12:00 pm
Bellaire
K-5 "Following the Dream: Reaping the Reward!”
Do you remember when you still had a dream of total success? What happened? Your dream did not move so you must have left it behind. Are you ready to start again and rekindle that burning desire? Let’s recapture that feeling of power that comes with knowing dreams can be achieved and that with every successful dream, another dream comes into place adding a chance to move even further into the original plan you had for your life. Come dream with us …

Presenter: Gerri Warden, Fleet and Family Support Center/US Navy

Tuesday, May 20
2:15 pm – 3:45 pm
Bellaire
K-6 “Innovation by Collaboration: Chicago’s Homelessness Prevention Call Center”
Hear how the creation of a call center infrastructure is being used for the plan to end homelessness in Chicago, the third largest U.S. city. Learn the key success factors for collaboration projects between municipalities, continuum alliances, foundations, fiscal agents, competing nonprofits and/or social service agencies.

Presenter: Sandra Murray, Homelessness Prevention Call Center, Catholic Charities of Chicago

Wednesday, May 21
9:00 am – 10:30 am
Bellaire
K-7 “Growing a Program”
Yippee! A new grant! Oh, no! What do we do now? Discuss what transpires when an I&R agency receives a grant that targets a specialized population what comes after the Oh, no! Use that single grant as a stepping-stone to developing expanded agency programming and expertise.

Presenters: Bridget Wolf, FIRSTLINK; Jan Leibovitz Alloy, FIRSTLINK

Wednesday, May 21
10:45 am – 12:15 pm
Tanglewood
K-8 “One Vision, One Call: Coordinated Human Service Transportation Systems using Technologies”
This workshop highlights the importance of transportation as an integral part of the I&R services. It discusses ongoing federal efforts in advancing human service transportation using technologies and puts a particular emphasis on how and the extent to which the I&R community plays an important role in the overall success of the projects.

Presenter: Yehuda Gross, United States Department of Transportation, Intelligent Transportation Systems (ITS) Joint Program Office

Wednesday, May 21
10:45 am – 12:15 pm
Bellaire
K-9 “Adapting a Community Resource Database for Online Mapping Systems”
Making 211 data useful for planning in the nonprofit sector is not as simple as merely putting dots on a map. We’ll discuss gaps between how information is designed for 211 versus what’s required for planning and how our multi-purpose resource database is proving critical to strategically rebuilding New Orleans.

Presenters: Jonathon Padgett, VIA LINK 211; Denice Warren Ross, Greater New Orleans Nonprofit Knowledge Works

Wednesday, May 21
2:15 pm – 3:45 pm
Post Oak
K-10 "Lasso Your Data: Collecting Data for Evaluation Follow-Up, Crisis, Advocacy and Unmet Needs to Help You Hog Tie Accreditation”
Handling crisis calls, providing advocacy, listening to caller’s unmet needs and following up are activities I&R specialists do every day. This workshop will help you understand the AIRS standards for tracking these activities and provide examples of how to capture the data to show stakeholders the real work you do.

Presenter: Nathan Salzl, Greater Twin Cities United Way/United Way 211
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☐ Come to the IRis demonstration meeting, Tuesday, 5/20, 11:00 am in the exhibit hall.

Or, contact us once you get back to the office!

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<td>VisionLink, Inc.</td>
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### Exhibitors by Booth Number

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<td>40 AARP Foundation</td>
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</tbody>
</table>
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www.aarp.org/foundation
AARP Foundation is AARP’s affiliated charity. Providing security, protection and empowerment for older persons in need, Foundation programs include job training and placement for older workers, tax assistance and preparation for low- and moderate-income individuals, public benefits screening for older adults and their families, information navigation for grandfamilies, and more.

Alzheimer’s Association
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The Alzheimer’s Association is the leading voluntary health organization in Alzheimer’s care, support and research. Our mission is to eliminate Alzheimer’s disease through the advancement of research; to provide and enhance care and support for all affected; and to reduce the risk of dementia through the promotion of brain health.

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sreynolds@n4a.org
www.eldercare.gov
The Eldercare Locator is the first step to finding resources for older adults in any U.S. community. Contact 800.677.1116 or www.eldercare.gov. This free national service of the U.S. Administration on Aging is administered by the National Association of Area Agencies on Aging (n4a).

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lduckworth@mercymedicalairlift.org  
www.mercymedical.org  
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robert.bransford@militaryonesource.com  
www.militaryonesource.com  
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**National Library of Medicine**  
Susan Meyers  
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susanm@u.washington.edu  
I & R workers and their callers have free access to quality health and referral information using the National Library of Medicine’s (NLM) MedlinePlus and its community-level GoLocal feature. NLM, the world's largest biomedical library, also produces resources for disaster planning, environmental health, medical research and clinical support.

**North Light Software, Inc.**  
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nina@socialserve.com  
www.socialserve.com  
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**Social Security Administration**  
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Social Security's online services are convenient and secure. SSA's website, http://www.socialsecurity.gov/ provides general or specific information on Social Security, and the public can apply for retirement & disability benefits as well as Medicare Prescription Drug cost Extra Help online, conduct other businesses or obtain information without making an appointment, calling or visiting a Social Security office.
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www.harmonyis.com
Harmony Information Systems is the leading provider of integrated case management software for human services. Harmony offers a flexible, web-based case management solution that automates and simplifies cases management processes and creates a centralized, comprehensive client view, resulting in maximization of client outcomes, improved efficiency of service delivery, and compliance with funding requirements.

United Way of America
Linda Daily, Director, 211
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Alexandria, VA 22314
703-836.7112 x 474
www.unitedway.org
United Way is a national network of nearly 1,300 local organizations that advance the common good, creating opportunities for a better life for all by focusing on the three key building blocks of education, income and health. As one part of this work, 211 provides a simple and critical connection between people who need help and those who want to help. Living united means being a part of the change. For more information about United Way, please visit: www.unitedway.org.

VisionLink Inc.
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303-402-0170
solutions@visionlink.org
www.visionlink.org
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Westin Floor Plan

The Westin Galleria: Third Level

The Westin Galleria: Fourth Level

The Westin Oaks: Third, Fourth, and Twenty-first Levels

The Galleria
Thank You!

A big AI RS thank you to all our volunteers who helped make this conference a success!

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