Program

35th I&R Annual Training and Education Conference
Hilton Portland & Executive Tower, Portland, Oregon

June 2-5, 2013

www.airs.org

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On behalf of the AIRS Board of Directors, we welcome you to Portland, Oregon and the 35th Annual I&R Training and Education Conference. This marks a milestone year for AIRS as we celebrate our 40th anniversary. The conference has always been a cornerstone of AIRS and an unparalleled opportunity for hundreds of I&R professionals to learn, share and connect.

Our dedicated Conference Committee, Program Track Managers, staff, national partners and affiliates have worked diligently to put together a practical, thought-provoking and informative program totaling over 80 different workshops. There is something here for everyone. For the latest information on I&R products and services, the vendor exhibits are not to be missed. Our vendor and sponsor partners play a critical role in the success of the conference and we are grateful for their support.

In addition to the various symposiums and workshops, please join us for the opening networking reception in the Exhibit Hall as well as the Tuesday luncheon sponsored by our partners in “aging.” Also join us on Tuesday evening for the Portlandia Reception and the popular Friends of AIRS Silent Auction. After the reception and auction, join our local hosts from Northwest AIRS on a tour of the interesting spaces and places that the “City of Roses” has to offer.

This is your conference to network, share best practices, identify and overcome challenges and to further enhance your I&R acumen and acuity. The conference provides us with a platform to expand our horizons, gain fresh perspectives and enhance our competencies. The face-to-face human interaction that occurs at the AIRS Conference is invaluable and you are gently exhorted to take advantage of this opportunity.

As you take part in the conference, you will see many people identified as AIRS board members or staff on their name badges. These are people that can answer your questions and direct you to resources. AIRS has a tradition of collegiality and inclusivity and we want you to feel that you are part of the organization and the conference… because you are! We’re glad you’re here and we’re ready to help. It is time to blaze the trail. Enjoy the conference!

Hamish Faed Hendry
AIRS President
For the first time at AIRS, we have a “Serving the Military Track” with workshops designed specifically for community I&R service providers.

Since the inception of the White House initiative, Joining Forces, there is no better time for community and military services to work together to provide a continuum of care and resources to those in the military community. The First Lady and Dr. Biden have met with military families, learned about their successes and challenges, and made it their priority to support them. Joining Forces is a comprehensive national initiative to mobilize all sectors of society to give our service members and their families the opportunities and support they have earned.

The stress of war, multiple deployments, and frequent moves can affect the wellness of military families. Children and spouses can experience anxiety, changes in relationships with family and friends, isolation or emotional challenges in dealing with deployments, illness or injury, and high mobility. Our workshops will provide you with insight and resources so you know how best to help these families.

With the downsizing of the military services, you can expect to receive more phone calls from veterans who are trying to navigate their way through civilian life. Our workshops will assist you in identifying resources that can help them, and will give you valuable insights into why military members think and act like they do. You will receive valuable information that will empower you.

Thank you for what you have already done to assist service members and veterans. I am sure that the Serving the Military track workshops will provide you with valuable knowledge and insight that will empower you in your professional life as you strive to bring the best support you can to military members, veterans and their families.

Please join us as we learn from each other, network with each other, and have an enriching conference experience!

Lucinda S. Lorei
Information and Referral Program Manager
Personal & Professional Development (MFR)
Marine and Family Programs Division
Headquarters US Marine Corps
Dear Colleagues,

We invite you to join us for the 35th National Aging and Disability Information and Referral Symposium during this year’s AIRS Conference. The Symposium is convened by the National I&R/A Support Center at the National Association of States United for Aging and Disabilities (NASUAD) in collaboration with the U.S. Administration for Community Living (ACL) and the National Association of Area Agencies on Aging (n4a), and offers a pre-conference National I&R/A Summit for aging and disability professionals, an Aging and Disability Luncheon, and a full complement of workshops, panel discussions and lively conversation throughout the week. Essential for keeping apprised of the latest developments in aging and disability I&R/A, the Symposium sessions will feature national, state and local professionals presenting on hot topics such as national policy, Options Counseling, Care Transitions, the Affordable Care Act, veterans’ programs and services, caregiving and cultural competency. Symposium coordinators have worked closely with other track managers this year to create meaningful crosswalks between tracks, so we expect all I&R professionals, not just those with an aging and disability focus, to benefit from our sessions.

Aging and Disability I&R/A professionals are invited to attend the a National Aging and Disability Pre-Conference Summit on Sunday, June 2, for networking, discussion and technical assistance on current trends, new initiatives and innovations in service delivery. We will also be kicking off the CIRS-A Train-the-Trainer Initiative where we invite you to be one of the first participants in the new training. On Tuesday, June 4, you will not want to miss the luncheon featuring Vicki Schmall, Executive Director, and Gerontology & Training Specialist with Aging Concerns in West Linn, Oregon, who will present an uplifting discussion on how to prevent caregiver burnout, especially with the populations of older adults and people with disabilities.

Special thanks to our federal and national partners, ACL, n4a and AIRS for their incredible support to NASUAD each year in coordinating the National Aging and Disability I&R Symposium.

With Appreciation,

Martha A. Roherty
Executive Director
National Association of States United for Aging and Disabilities
The four following pre-conference training courses offer participants the opportunity to explore important topics in greater detail. These all-day sessions run concurrently. Pre-registration is required.

**INTENSIVES**

**“THE ABC’S OF I&R”**  
**Pavilion East (Plaza level)**  
**Instructors:** Faed Hendry, Findhelp Information Services, Toronto, Ontario; Shye Louis, Goodwill of the Finger Lakes, Rochester, New York  
This workshop is for front-line I&R Specialists who are relatively new to the field or for more experienced staff who will be taking the CIRS or CIRS-A exam. This interactive and participatory session will address the practical application of performance-based competencies, the how to’s of conducting an effective needs assessment and dealing with a range of client inquiries and types.

**“RESOURCE DATABASE POLICIES AND PROCEDURES THAT SUPPORT BEST PRACTICES”**  
**Broadway I (Plaza level)**  
**Instructors:** Sue Boes, United Way for Southeastern Michigan, Detroit, Michigan; Maria Williams, United Way for Southeastern Michigan, Detroit, Michigan  
Do you have any documented policies aside from your inclusion/exclusion criteria statement? How do they support your database management practices? This workshop will identify and explain valuable policies for all resource managers, including those new to the field, advanced resource personnel, solo database managers, and those seeking AIRS accreditation. Participants will have an opportunity to draft policies that can be implemented within their centers. The workshop will also address the importance of database quality assurance, communication protocols within a center, and identifying and executing projects to improve parity in a resource database.

**“BLAZING THE TRAIL OF EFFECTIVE SUICIDE POSTVENTION AND RESPONSE”**  
**Broadway 3 (Plaza level)**  
**Instructor:** John Plonski, Suicide Prevention Coalition of Long Island, Hicksville, New York  
I&R has proven itself to be an asset in times of natural disaster. Like a disaster, a suicide can have a devastating impact on a community. The shock and grief ripples throughout the community affecting friends, co-workers, as well as other community institutions. During such occasions the I&R provider is uniquely positioned to promote healing and reduce future suicide risk for the community. Connect Postvention Training will demonstrate how a coordinated response following a sudden death in a community promotes healing and can help prevent future deaths by suicide. Attendees will return home with the tools that will position them to take the lead role in establishing a coordinated postvention response to sudden death within their communities. By recognizing that postvention becomes prevention, your agency can help make your community a safer place to live.

**“STRATEGIC TRAINING FOR QUALITY RESULTS”**  
**Pavilion West (Plaza level)**  
**Instructor:** Amy Latzer, 211 LA County, San Gabriel, California; Caroline Leverette, 211 LA County, San Gabriel, California  
Want to improve your quality? Want to make your training more effective? Want new results? Well, then come spend the day learning a new approach to training, coaching, and quality. We will work with you to develop a plan to implement this new approach to get started right when you get home from the conference. This will be an interactive workshop that will be fun, energetic, and effective. Come learn how to review and develop protocols, develop retention tools, write and review self-assessment surveys, organize huddles, and a mystery call campaign specific for your contact center’s needs. This intensive workshop is best geared for supervisors and managers of I&R contact centers.

**NATIONAL AGING AND DISABILITY I&R/A**  
**A PRE-CONFERENCE SUMMIT**  
**Sunday, June 2**  
**9:00am – 3:00pm**  
**Galleria North (Ballroom level)**  
Aging and disability professionals in I&R/A are invited to join the National Association of States United for Aging and Disabilities (NASUAD’s) National I&R/A Support Center, the U.S. Administration for Community Living (ACL), and the National Association of Area Agencies on Aging (n4a) for a lively and thought-provoking day of interactive events and discussion with I&R/A and national association professionals prior to the start of the AIRS Conference.  
**The Summit includes:**  
1. A networking breakfast at which you can catch up with your national Aging and Disability I&R/A counterparts and mingle with staff from ACL, NASUAD and n4a.  
2. A discussion focused on state-to-state interaction and technical assistance where participants will share their experiences and ask questions about current trends, new initiatives and upcoming national events in I&R/A service delivery.  
3. The kick-off of the National I&R/A Support Center’s Train-the-Trainer Initiative for the National coordination of CIRS-A (Certification for I&R Specialists in Aging) training. Participants will provide feedback to Support Center staff on the new national initiative and prepare to become trainers for AIRS Certification. This is the only opportunity during the week of the AIRS conference for Aging and Disability I&R/A professionals to gather and have time to focus exclusively on industry trends, initiative, challenges and solutions. Throughout the Summit, participants will have opportunities to network with peers from around the
country, participate in group discussions, learn about innovative strategies for service delivery, and consider new approaches to aging and disability I&R/A development. There is no charge to attend this event. Pre-registration is requested to ensure adequate materials and refreshments. Please contact Support Center coordinator, Sara Tribe at 202.898.2578 x 305 or stribe@nasuad.org, to register for the Summit, to ask questions and/or to suggest topics that you would like to discuss at the National Aging and Disability I&R/A Pre-Conference Summit.

2-1-1 State Directors Meeting
Sunday, June 2
1:00pm – 5:00pm
Galleria South
The annual networking and sharing session of 211 State Directors and 211 US Steering Committee members.

AIRS Certification Exams
Sunday, June 2, 1:30pm, Parlors B & C (Ballroom level)
Tuesday, June 4, 2:30pm, Grand Ballroom 1 (Ballroom level)
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, June 2 at 1:30 pm and Tuesday, June 4 at 2:30 pm. You must be pre-registered and approved through the AIRS National Office to be eligible to take the exams.

Newcomers’ and Military Orientation
Sunday, June 2
4:30pm – 5:30pm
Parlors B&C (Ballroom level)
All new members, first time attendees, solo attendees, and military personnel and everyone who would like to come along, are invited to join the AIRS Board of Directors, conference staff and volunteers, as well as our local hosts from Northwest AIRS to ask questions about AIRS, network, and learn about the conference and the eclectic city of Portland.

Welcome Reception in the Exhibit Hall
Sunday, June 2
5:30pm – 6:30pm
Grand Ballroom 2 (Ballroom level)
Join your friends, colleagues and AIRS exhibitors at the opening event of the AIRS conference. Enjoy delicious appetizers and a cash bar (average alcoholic drink cost is $7.75), while you network and tour the exhibit hall in a fun-filled, relaxed atmosphere.

“Portlandia” Networking Reception and Friends of AIRS Auction
Tuesday, June 4
5:00pm - 6:30pm
Pavilion Ballroom (Plaza level)
Portland has so much to offer, we are combining and expanding the popular Friends of AIRS silent auction with our evening event. By popular demand, we are leaving Monday night open for you to sightsee, tour, dine, etc. On Tuesday evening, join us for a casual networking reception with light appetizers, music and cash bar (average alcoholic drink cost is $7.75), all while you bid on wonderful, unique auction items. The rest of the evening will be yours to either join our local hosts from Northwest AIRS on several local tours or sightsee on your own. Enjoy the “City of Roses” and raise money for AIRS conference scholarships at the same time. This event is included in your full registration fee.

Movie Nights
Feel like staying in or grabbing a meal at the food carts and then relaxing at the hotel? Join us for two very special movies.
Monday, June 3
8:00pm – 8:30pm
Broadway 1&2
“Tell Me Where to Turn” (1969 film on the work of Information and Referral Services)

Tuesday, June 4
8:00pm – 9:30pm
Broadway 1 & 2
“American Winter” (HBO-produced documentary on the impact of the economic crisis, featuring the work of 211info of Portland)

AIRS Annual Membership Meeting & Luncheon
Wednesday, June 5
12:30pm – 2:00pm
Grand Ballroom 1 (Ballroom level)
Everyone is encouraged to join us at the annual membership meeting and luncheon which includes the presentation of the AIRS Awards of Accreditation and the opportunity to meet AIRS board members.

Cyber Café
Grand Ballroom 2 (Ballroom level)
Open daily in the exhibit hall during opening hours. Keep in touch with your office, family, and co-workers online in the AIRS Cyber Café. Computers provided for your convenience.
Ms. Smith was elected Multnomah County Commissioner in 2010 representing North and Northeast Portland in District 2. She has lived in the district for the past twenty-five years and is a strong advocate for making the entire county a better place by focusing at all times on her priorities of jobs, young people and senior citizens.

Ms. Smith brings more than two decades of experience in the federal government to her commissioner’s job, applying that knowledge to increasing federal resources for Multnomah County. After graduating from Oregon State University, Loretta began working as a staff member for then U.S. Representative Ron Wyden. Loretta continued to work for now Senator Wyden as his Multnomah County field representative until her election to the county Board of Commissioners.

During her term on the county Board of Commissioners, Loretta has put her passion for helping young women and men into practice by leading the Summer Youth Connect program and organizing an anti-bullying summit at Grant High School. Similarly for senior citizens, Loretta has spotlighted the need to fight elder abuse and neglect. She has worked to support local business by championing a micro lending program to help local small businesses, hosting a White House roundtable for young entrepreneurs and co-sponsoring an ordinance establishing a Business Advisory Council to the Board of Commissioners.

In addition to serving on the county Board of Commissioners, Loretta also is Chair of Metro’s Policy Advisory Committee. Loretta’s commitment to community involvement long predates her elected position. Loretta has served as treasurer of the Oregon Assembly for Black Affairs, tutored students at Self Enhancement Inc., served on the PTA, and worked with the Community Builders program for urban young men. Loretta has also been active in helping the Oregon Food Bank, Head Start and the Boys & Girls Club. Loretta and her son Jordan, who currently attends the University of Washington, live in Northeast Portland.

Dr. Schmall is Executive Director and Gerontology & Training Specialist with Aging Concerns in West Linn, Oregon. She is also Professor Emeritus of Oregon State University (OSU) where she worked for twenty-five years, serving as the Director of the OSU Program on Gerontology and the Gerontology Specialist in the OSU Extension Service. Dr. Schmall developed “Powerful Tools for Caregiving”, an intensive training program for family caregivers to older adults, for Legacy Health System. The program, which is currently in thirty-two states and overseas, enhances caregivers’ self-efficacy and self-care. The program received a national award from Met-Life and the National Alliance on Caregiving. It has also been featured in the Wall Street Journal and an article by Gail Sheehy in Parade Magazine, distributed nationally in Sunday newspapers. Recently the Administration on Aging recognized the “Powerful Tools for Caregiving” program with its highest criteria level for evidence-based program.

Dr. Schmall is lead author of the book, “The Caregiver Helpbook: Powerful Tools for Caregiving.” She also produced a video, “The Many Faces of Caregiving”, which illustrates the diversity and impact of family caregiving. Her areas of expertise include family decision-making and caregiving in later life, aging and health-related changes-physical, family communication and caregiving issues (including Alzheimer’s disease and related dementias), mental health issues, sensitivity training on aging-related changes, learning and memory in later life, late-life sexuality and curriculum design and training. Dr. Schmall has conducted over 900 workshops for staff, families, older adults and professionals throughout the United States, Canada, Guam and Thailand. She has authored over 100 professional articles and book chapters and written eight nationally distributed training manuals. She consults with families, organizations, businesses, community agencies and long term care and retirement housing facilities about eldercare issues.

Sponsored By: The National Aging and Disability I&R/A Support Center and the National Association of State United for Aging and Disabilities (NASUAD)
National Association of Area Agencies on Aging (n4a)
U.S. Administration on Aging
Conference and Presenter Evaluation Forms
Your feedback is important and needed in helping us plan future conferences. Every year we make changes based on what we read in the evaluations. Please take a few 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 $35 for members and $45 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!

Photo Release
Attendees, exhibitors and speakers grant permission to AIRS and their agents to use their image or likeness in an effort to promote AIRS events. Attendees, exhibitors and speakers waive any right to inspect or approve the finished product(s). Any photos or likeness taken of attendees, exhibitors and speakers at the conference, becomes the sole and exclusive property of AIRS.

United Way Flexible Credits
United Ways are able to use flexible credits to offset registration and some travel costs for the 2013 AIRS Conference. United Way Worldwide (UWW) Flexible Credits may be used for the conference registration fee and some travel expenses and per diems. To check your flexible credit balance visit: http://online.unitedway.org/flexcredits (only for United Way members).

The UWW Learning Opportunities policy requires all conference costs and expenses be paid in advance. After completion of the program, submit the following three items to obtain reimbursement through flexible credits to: Registrar, Learning Opportunities, United Way Worldwide, 701 North Fairfax Street, Alexandria, VA 22314. Please contact the Registrar at 703.836.7112 x 237 with questions. The three items are:
• Your CEO’s written permission
• A copy of your completed registration form
• Proof of payment (either a cancelled check or a credit card receipt showing the charge)

A $35.00 fee for processing your flexible credit reimbursement request will be charged for this special approved provider offering. Registration for the conference will be reimbursed at the early bird registration rate only.

Lateness Etiquette
Due to the nature of our sessions and to minimize disruptions, when there is a “session full” notice on the door, you will not be allowed to enter the session. We appreciate your cooperation and understanding.
## Schedule At A Glance

### Sunday, June 2

<table>
<thead>
<tr>
<th>Event</th>
<th>Time</th>
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<tbody>
<tr>
<td>Registration – Plaza Foyer</td>
<td>7:00am 6:00pm</td>
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<tr>
<td>National Aging &amp; Disability I&amp;R/Assistance Summit – Galleria North</td>
<td>9:00am 3:00pm</td>
</tr>
<tr>
<td>The ABC’s of I&amp;R Intensive - Pavilion East</td>
<td>9:00am 4:15pm</td>
</tr>
<tr>
<td>Resource Database Policies &amp; Procedures Intensive - Broadway 1</td>
<td>9:00am 4:15pm</td>
</tr>
<tr>
<td>Strategic Training for Quality Results Intensive – Pavilion West</td>
<td>9:00am 4:15pm</td>
</tr>
<tr>
<td>Effective Suicide Postvention &amp; Response Intensive - Broadway 3</td>
<td>9:00am 4:15pm</td>
</tr>
<tr>
<td>211 State Directors Conference – Galleria South</td>
<td>1:00pm 5:00pm</td>
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<tr>
<td>AIRS Certification Exams – Parlors B &amp; C</td>
<td>1:30pm 3:30pm</td>
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<tr>
<td>Newcomers &amp; Military Orientation &amp; Welcome – Parlors B &amp; C</td>
<td>4:30pm 5:30pm</td>
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<tr>
<td>Opening Reception in Exhibit Hall – Grand Ballroom 2</td>
<td>5:30pm 6:30pm</td>
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### Monday, June 3

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<tr>
<td>Registration – Plaza Foyer</td>
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<tr>
<td>Cyber Café – Grand Ballroom 2</td>
<td>8:00am 4:00pm</td>
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<tr>
<td>Opening Breakfast (Open to all) – Grand Ballroom 1</td>
<td>8:00am 9:45am</td>
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<tr>
<td>Exhibits Open – Grand Ballroom 2</td>
<td>8:00am 4:00pm</td>
</tr>
<tr>
<td>Workshops</td>
<td>10:00am 11:30am</td>
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<tr>
<td>Lunch on your own</td>
<td>11:30am 1:00pm</td>
</tr>
<tr>
<td>Workshops</td>
<td>1:00pm 2:30pm</td>
</tr>
<tr>
<td>Refreshment Break in Exhibit Hall – Grand Ballroom 2</td>
<td>2:30pm 3:00pm</td>
</tr>
<tr>
<td>Workshops</td>
<td>3:15pm 4:45pm</td>
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<tr>
<td>Dinner on your own</td>
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<tr>
<td>Movie Night - Broadway 1&amp;2</td>
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### Tuesday, June 4

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<tr>
<td>Registration – Plaza Foyer</td>
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<tr>
<td>Cyber Cafe – Grand Ballroom 2</td>
<td>8:00am 5:00pm</td>
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<tr>
<td>Breakfast on your own</td>
<td></td>
</tr>
<tr>
<td>Workshops</td>
<td>8:30am 10:00am</td>
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<tr>
<td>Exhibits Open – Grand Ballroom 2</td>
<td>8:00am 5:00pm</td>
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<tr>
<td>Refreshment Break in Exhibit Hall – Grand Ballroom 2</td>
<td>10:00am 10:30am</td>
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<tr>
<td>Workshops</td>
<td>10:30am 12:00pm</td>
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<tr>
<td>NASUAD Sponsored Luncheon (Open to all) - Grand Ballroom 1</td>
<td>12:15pm 2:00pm</td>
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<tr>
<td>Workshops</td>
<td>2:15pm 3:45pm</td>
</tr>
<tr>
<td>AIRS Certification Exams - Grand Ballroom 1</td>
<td>2:30pm 4:30pm</td>
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<tr>
<td>“Portlandia” Networking Reception and Friends of AIRS Auction – Pavilion Ballroom</td>
<td>5:00pm 6:30pm</td>
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<tr>
<td>Movie Night – Broadway 1&amp;2</td>
<td>8:00pm 9:30pm</td>
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### Wednesday, June 5

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<td>Registration - Plaza Foyer</td>
<td>8:00am 12:00pm</td>
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<tr>
<td>Cyber Cafe - Grand Ballroom</td>
<td>8:00am 3:00pm</td>
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<tr>
<td>Workshops</td>
<td>9:00am 10:30am</td>
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<tr>
<td>Exhibits Open – Grand Ballroom</td>
<td>8:00am 3:00pm</td>
</tr>
<tr>
<td>Workshops</td>
<td>10:45am 12:15pm</td>
</tr>
<tr>
<td>Annual Meeting &amp; Membership Luncheon (Open to all) – Grand Ballroom 1</td>
<td>12:30pm 2:00pm</td>
</tr>
<tr>
<td>Workshops</td>
<td>2:15pm 3:45pm</td>
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Monday, June 3
10:00am – 11:30am
A-1: Updates on the Latest National News in Aging and Disability: ACL, n4a, and NASUAD – Pavilion West
A-2: Community Options for Seniors: PACE (Program of All-Inclusive Care for the Elderly) and Transition Services, Special Needs Resources – Broadway 1&2
B-1: The Campaign to Connect Everyone to Health Insurance Coverage: What 211s Need to Know in this Most Critical of Years – Pavilion East
C-1: Bridging the Gap from Military Service to Civilian Life – Council Suite
D-1: Hurricane Sandy: Managing Call Surge with I&R Partners – Broadway 3&4
E-1: Thinking Outside the Box: Creative Resource Ideas for Return Callers – Parlors B&C
G-1: Resource 101 Database Semi-Cavalcade – Galleria 3
H-1: Effective Web Strategies – Forum Suite
K-1: Breaking it Down: How to Achieve AIRS Accreditation – Galleria 1

1:00pm – 2:30pm
A-3: Impact of Caring for People with Disabilities and Dementia: Preventing Family Caregiver Burnout – Pavilion West
A-4: The Affordable Care Act: The Current State of the States – Broadway 1&2
B-2: “211? What Are You Doing Here?” Emergency Management Agencies’ view of 211’s Role in a Disaster and How to Establish or Improve your Relationship with Them – Pavilion East
C-2: What Can We Do? How We, Together, Can Support Those Who Defend Our Nation – Council Suite
D-2: Introduction to Psychological First Aid: Find Your Chi in a World of Chaos! (Part One) – Broadway 3&4
E-2: Cultural Competency: Ethical Considerations on Reaching Latino Population – Parlors B&C
F-2: Is It Good Enough? Evaluating & Modifying Your Call Center Training Curriculum to Meet the Needs of Your Clients and Mission – Galleria 2
G-2: Hitching up your Team: How to Successfully Combine Resource Databases from Multiple I&R Agencies – Galleria 3
K-2: Washington Update: Public Policy and Advocacy – Galleria 1

3:15pm – 4:45pm
A-6: Understanding the Unique Challenges Faced by Lesbian, Gay, Bisexual and Transgender (LGBT) Older Adults – Broadway 1&2
B-3: 211 Participation in CDC Flu Pandemic Simulation – Pavilion East
D-3: Introduction to Psychological First Aid: Find Your Chi in a World of Chaos! (Part Two) – Broadway 3&4
E-3: When You’re Stumped: Providing Creative I&R – Parlors B&C
F-3: Coordinated Entry for Homeless Families: Concept to Contract – Galleria 2
G-3: Resource Check-up & Diagnosis - Conducting a Database Audit – Galleria 3
H-3: Serving the Underserved on the Web – Forum Suite
K-3: Laughter Yoga in the Workplace: Laughing At Work Makes Business Sense – Galleria 1

Tuesday, June 4
8:30am – 10:00am
A-7: Mission Accessible: Disability Rights and Culture 101 – Pavilion West
A-8: Navigating the Road of Transportation Options – Broadway 1&2
B-4: 211 Assembly (Part One) – Pavilion East
D-4: Disaster Management 2020: An Eco-System during Disasters for Service Provision and Why it Makes Sense for Consumers and Providers (Part One) – Broadway 3&4
E-4: Rapport: Making the Connection – Parlors B&C
F-4: How to Develop and Implement an Internship Program – Galleria 2
G-4: Taming the Beast: Indexing with the AIRS/211 LA County Taxonomy (Part One) – Galleria 3
H-4: Impactful Reports Made Easy and Pretty with MS Excel – Forum Suite
K-4: From Aspirations to Outcomes: Building and Sustaining Effective Collaboration – Galleria 1

10:30am – 12:00pm
A-9: Implementing a Statewide ADRC Care Transitions Program: Tips and Toolkit – Pavilion West
B-5: 211 Assembly (Part Two) – Pavilion East
C-4: Bridging the Mental Health Divide: Aging and Veteran Mental Health Needs, Services and Resources – Council Suite
D-5: Disaster Management 2020: An Eco-System during Disasters for Service Provision and why it makes Sense for Consumers and Providers (Part Two) – Broadway 3&4
E-5: Community-wide Common Intake – Parlors B&C
F-5: Making the AIRS Standards Work for You as a Specialized I&R Provider – Galleria 2
G-5: Taming the Beast: Indexing with the AIRS/211 LA County Taxonomy (Part Two) – Galleria 3
H-5: The Open Source Panel – Forum Suite
H-6: Mobile I&R: There’s an App for That! – Broadway 1&2
K-5: Beyond the Call Center, Using the I&R Resource Database to Interact with Clients, Agencies, and Community Members – Galleria 1
2:15pm – 3:45pm
A-10: ADRC Options Counselor Collaborations with Medicare Counselors to Provide Medicare Information and Assistance via SHIP (in NW a.k.a. SHIBA): Roles, Opportunities and Collaborative Cross Training to Assist Aging Adults, Caregivers, Veterans and Families – Pavilion West
A-11: Serving Hard-to-Reach Populations: Improving Cultural Competency, Outreach and Service Access – Broadway 1&2
B-6: Communicating 211 Value in Terms Others Can Understand – Pavilion East
C-5: Resources for Wounded Warriors, their Families and Caregivers: How the USO Warrior and Family Care and DoD Programs Support Injured Warriors and their Families – Council Suite
E-6: Chat & Text: A New Way to Access I&R – Parlors B&C
F-6: Training or Supervision: Determining the Root Cause of Performance Compliance Issues – Galleria 2
G-6: Resource Writing and You: A Forum – Galleria 3
H-7: Learn How Texting Works for I&R, Family Health, Emergency Shelter Programs and During Disasters – Forum Suite
K-6: Revised AIRS Standards and Quality Indicators for Professional Information and Referral, Version 7.0 – Galleria 1

Wednesday, June 5
9:00 am – 10:30am
A-12: I&R and Options Counselors Panel Discussion: Federal, State and Local Perspectives – Pavilion East
B-7: 211 Cooperative Relationships: If You Build It, They Will Come! – Pavilion East
C-6: Access to VA Benefits and Vocational Rehabilitation and Employment/Chapter 31 Benefits – Council Suite
E-7: I&R in the World of Community-Based Transportation – Parlors B&C
F-7: Not just a Standard, Program Evaluation and Quality Assurance – Galleria 2
G-7: The “In’s” and “Out’s” of Inclusion/Exclusion Policies – Galleria 3
H-8: I&R’s David to Google’s Goliath: How to Leverage a Niche and be our Clients’ Go-To Search Engine – Forum Suite
K-6: Worksite Wellness: Shape up your Agency – Galleria 1

10:45am – 12:15pm
A-15: National Aging and Disability I&R/A Support Center Services, Survey and Training Opportunities – Broadway 1&2
C-7: Community Partnerships for Veterans with Disabilities: Veteran Directed Home and Community Based Services (VDHCBS) and Beyond – Council Suite
D-7: Family Assistance Center during a Mass Fatality Event using 211 as the Primary Point of Contact – Galleria 1
E-8: Compassion Fatigue: Caring for Self While Caring for Others – Parlors B&C
F-8: Three Things you Need to Know About Leveraging Mutually Beneficial Partnerships: Sustaining Innovative Programs in the I&R World – Galleria 2
G-8: Oregon’s Trail to Building a Statewide Aging and Disability Resource Center (ADRC) Database – Galleria 3
K-8: Reaching and Connecting Populations Most at Risk for Poor Health Outcomes in the Community – Forum Suite

2:15pm – 3:45pm
B-9: 211US Steering Committee Open House – Pavilion East
F-9: All Things I&R Management Open House – Galleria 2
G-9: Resource Database Open House – Galleria 3
H-9: I&R Technology Open House – Galleria 1
Monday, June 3
10:00 am – 11:30 am
Pavilion West
A-1: Updates on the Latest National News in Aging and Disability: ACL, n4a, and NASUAD
Attendees will review and discuss the latest updates from the U.S. Department of Health and Human Services, Administration for Community Living (ACL); the National Association of States United for Aging and Disabilities (NASUAD); and the National Association of Area Agencies on Aging (n4a). A broad range of topics will be discussed to give supervisors and front line staff of state and local agencies for aging and disability a comprehensive review of current trends in Care Transitions, Eldercare Locator, innovative models for the delivery of I&R/A and the latest updates on the Affordable Care Act.
Sherri Clark, Administration for Community Living (ACL), Washington, DC; Martha Roherty, NASUAD, Washington, DC; Sandy Markwood, n4a, Washington, DC

Monday, June 3
10:00 am – 11:30 am
Broadway 1 & 2
A-2: Community Options for Seniors: PACE (Program of All-Inclusive Care for the Elderly) and Transition Services, Special Needs Resources
This workshop is for individuals who work with seniors and need to better understand the community options available to appropriately refer people who call for help. PACE is a national model of care that integrates health services, long term care and public financing. Providence ElderPlace is the local PACE option in Portland. Learn who is eligible for PACE, how to identify if there is a PACE program in your community and how to refer individuals who may benefit from this model of care. The workshop will also show how the local Medicaid office in Portland (Multnomah County) works with the PACE program to move clients back to and keep them stable in the community. We will provide stories of client successes with the PACE model and how their lives have changed after moving from the acute care setting.
Jeanie Frederick, Providence ElderPlace, Portland, Oregon; Jody Michaelson, Aging & Disability Services, Portland, Oregon; Katie Mesirow, Aging & Disability Services, Portland, Oregon

Monday, June 3
1:00 pm – 2:30 pm
Pavilion West
A-3: Impact of Caring for People with Disabilities and Dementia: Preventing Family Caregiver Burnout
Whether caring for someone with a physical disability or someone who has Alzheimer’s disease/dementia, a challenge to family caregivers is taking care of themselves. The speaker will address factors that place family caregivers at higher risk for burnout, strategies that mediate caregiver stress and burnout, professional messages that can make a positive difference, resources that support family caregivers, and research findings about respite and other family caregiver-based programs.
Vicki L. Schmall, Aging Concerns, West Linn, Oregon

Monday, June 3
1:00 pm – 2:30 pm
Broadway 1 & 2
A-4: The Affordable Care Act: The Current State of the States
In June 2012, the Supreme Court upheld the Affordable Care Act (ACA). This workshop examines key provisions of ACA as it relates to older adults and younger adults with disabilities. We’ll review Medicaid expansion, care coordination for individuals dually eligible for Medicare and Medicaid, and how the Health Insurance Exchanges will work, including what open enrollment may look like in October and what consumer assistance will be available in each state.
Leslie Fried, National Council on Aging, Washington, DC

Monday, June 3
3:15 pm – 4:45 pm
Pavilion West
A-5: Aging & Disability Resource Centers: Change – Resilience - Sustainability
State and local ADRC pilot site representatives from Oregon and Washington (ACL ADRC Enhanced Options Counseling Part A grantees), will share their experiences, lessons learned and plans for ADRC sustainability. This facilitated panel discussion will reveal challenges, surprises, advice and plans for the future. It will be followed by an opportunity for attendance questions, input and discussion. Current and anticipated ADRC staff, as well as partners in collaborating I&Rs including the military, will be able to apply state and local experiences to their own unique situations.
Susan Shepherd, Washington State Department of Social & Health Services, Lacey, Washington; Nakeshia Knight-Coyle, State of Oregon Department of Human Services, Salem, Oregon; Marietta Bobba, Washington State Department of Social & Health Services, Lacey, Washington; Corrie Blythe, Southeast Washington Aging & Long Term Care, Yakima, Washington; Paul Calia, Pierce County Community Connections, Tacoma, Washington; Lee Girard, Multnomah County Aging & Disability Services Division, Portland, Oregon; Beth Jackson, NorthWest Senior and Disability Services, Salem, Oregon

Monday, June 3
3:15 pm – 4:45 pm
Broadway 1 & 2
A-6: Understanding the Unique Challenges Faced by Lesbian, Gay, Bisexual and Transgender (LGBT) Older Adults
As they age, lesbian, gay, bisexual and transgender (LGBT) older adults face a host of unique challenges. This workshop will provide
Tuesday, June 4
8:30am – 10:00am
Pavilion West
A-7: Mission Accessible: Disability Rights and Culture 101
This workshop includes an overview of the history of disability rights, disability rights laws and the most important keys to a better understanding of how to work with people with disabilities. Learn key elements of disability culture and best practices for callers with disabilities.
Bob Joondeph, Disability Rights Oregon, Portland, Oregon

Tuesday, June 4
8:30am – 10:00am
Broadway 1&2
A-8: Navigating the Road of Transportation Options
How does a caller seeking transportation options get routed through an I&R/A network? What if there is more than one access point? How are communities ensuring that efforts are not duplicative and that callers are getting the level of support appropriate to their need? This information-packed session will cover a range of mobility management initiatives and potential network partners via a panel representing national, local Aging I&R/A and ADRC, 211, One-Call, One Click and transportation options counseling perspectives in both rural and urban communities. A group activity will leave participants thinking about immediate and long-term improvements that can be made in the delivery of transportation I&R/A in their own communities.
Lynn Winchell-Mendy, n4a/NCST, Washington, DC; Patrice Earnest, Atlanta Regional Commission, Atlanta, Georgia; Dionne Armon, Community Council of Greater Dallas/211 Texas, Dallas, Texas; Angela Brown, n4a, Washington, DC; Ken Thompson, Easter Seals Project Action, Washington, DC; Janis Keith, Mid-East Area Agency on Aging, Manchester, Missouri

Tuesday, June 4
10:30am – 12:00pm
Pavilion West
A-9: Implementing a Statewide ADRC Care Transitions Program: Tips and Toolkit
The Washington State Unit on Aging (Aging and Disability Services) has led the way in pro-active and innovative implementation of a statewide Care Transitions Intervention (CTI) program which grew out of the ADRC Evidence-Based Care Transitions Program grant. This presentation will address steps the State Agency took to align key partners, resource statewide CTI training and support AAAs in developing effective local relationships with medical providers. Successful achievement of quantitative outcomes to reduce readmissions and other high cost medical utilization will be discussed. Presenters will provide a virtual fieldtrip of the online Aging and Disability Services CTI Implementation Toolkit. Participants will view customizable protocols for coach selection and orientation, templates for referral processes, data collection and other on-the-ground tools. The intended audience should be familiar with basic care transitions improvement concepts and the Eric Coleman Care Transitions Intervention Model. Both line staff with client contact and supervisory/leadership staff managing care transitions programs are appropriate audiences.
Susan Shepherd, Washington State Department of Social & Health Services, Lacey, Washington; Selena Bolotin, Qualis Health (QIO), Seattle, Washington; Rebecca Sandall, Qualis Health (QIO), Seattle, Washington

Tuesday, June 4
2:15pm – 3:45pm
Pavilion West
A-10: ADRC Options Counselor Collaborations with Medicare Counselors to Provide Medicare Information and Assistance via SHIP (in NW a.k.a. SHIBA): Roles, Opportunities and Collaborative Cross Training to Assist Aging Adults, Caregivers, Veterans and Families
Medicare can be confusing and 211s, Aging and Disability Resource Centers and anyone with a heart for aging adults needs an authoritative I&A resource to help with federal insurance! Improve your Medicare vocabulary with the A, B, C and Ds of Medicare, and the difference between Medicare and Medicaid. Learn about the roles and responsibilities of ADRC’s and cross-training in Medicare in Oregon and Alaska. Hear about the ways that SHIPs/SHIBAs provide counseling to beneficiaries, caregivers, families, veterans and retired military. Compare that to the roles and responsibilities of State Health Insurance Program (SHIPs/SHIBAs). See the similarities between the I&R function of the ADRC and the I&R, I&A, counseling and in-depth problem-solving role of the SHIPs/SHIBAs. Get a glimpse of a smooth transition between ADRC and SHIP and from SHIP to ADRC as well as cross-training opportunities that make navigation easier for aging Americans. We’ll encourage brainstorming to identify specific steps on building partnerships for successful program implementation.
Cynthia Hylton, Senior Health Insurance Benefits Assistance (SHIBA) Program, Oregon Insurance Division, Salem, Oregon; Judith Bendersky, Medicare Information Office (Alaska SHIP/SMP), Alaska Dept. of Health & Social Services, Anchorage, Alaska

Tuesday, June 4
2:15pm – 3:45pm
Broadway 1&2
A-11: Serving Hard-to-Reach Populations: Improving Cultural Competency, Outreach and Service Access
This session focuses on cultural competency, outreach to vulnerable older adults, and increasing awareness of the growing demographics of seniors in the following populations: African American, Asian American, Hispanic/Latino American, Native American, Pacific Islander, LGBT, and refugee communities. Presenters will discuss the responsibility of I&R/A professionals to exhibit cultural competency in interactions with all seniors, especially members of non-traditional communities, the importance of engaging specialized service providers/advisors who are also members of non-traditional communities, and methods
for increasing service access to vulnerable seniors. A presenter from Colorado's Refugee Services Program will review a grant used to coordinate outreach and service access to vulnerable older refugees. Learn how this grant has assisted in outreach to some of the most socially isolated and vulnerable older adults in the region.

Nicole Hartog, Denver Regional Council of Governments Area Agency on Aging, Denver, Colorado; Michael Styles, State Division Aging and Adult Services, Salt Lake City, Utah

Wednesday, June 5
9:00am – 10:30am
Pavilion East
A-12: I&R and Options Counselors Panel Discussion: Federal, State and Local Perspectives
This panel will provide attendees of all levels with a unique opportunity to hear national, state and local perspectives on the changes occurring nationwide with the expansion of ADRCs, rollout of the Options Counseling Standards, and blending traditional I&R services with new initiatives. Hear promising practices from 2012 ADRC grantees that have made headway on implementing changes, and participate in the discussion on how to stay on the cutting edge of I&R. Panelists from the national, state and local levels will reflect on questions from the moderator and attendees will have time for Q&A throughout the panel discussion.

Joseph Lugo, Administration on Community Living, Washington, DC; Sara Tribe, NASUAD, Washington, DC; Barbara Diehl, Prince William Area Agency on Aging, Woodbridge, Virginia; Maureen Strickland, Office for Resource Center Development, Madison, Wisconsin

Wednesday, June 5
9:00am – 10:30am
Broadway 1&2
As Social Security is closing offices and reducing public access, demand for information about SSDI is growing. One of the benefits of SSDI is Medicare eligibility. Medicare is instituting new programs regarding access to and costs of durable medical equipment, prosthetics, orthotics and supplies. This presentation will benefit those who serve the disability and chronic illness community, both on the front lines and in administration, who receive inquiries about SSI, SSDI and Medicare, especially regarding medical equipment and diabetic testing supplies.

Julie Bannester, Centers for Medicare & Medicaid Services – Region 10, Seattle, Washington; Tai Venuti, Allsup, Belleville, Illinois

Wednesday, June 5
10:45am – 12:15pm
Pavilion West

This workshop will use a short video, case studies and a game to initiate deeper awareness and ability to assist consumers to identify their root needs and potential resources. The presenters represent experience working in I&R as well as outreach and options counseling in a rural community, a medium-sized metro area and as a lead resource specialist.

Twila Jacobsen, Lane Council of Governments, Senior & Disabled Services/ADRC, Eugene, Oregon; Becky McMurrick, Lane Council of Governments, Senior & Disabled Services/ADRC, Eugene, Oregon; Judy Wolf, Lane Council of Governments, Senior & Disabled Services/ADRC, Eugene, Oregon

Wednesday, June 5
10:45am – 12:15pm
Broadway 1&2
A-15: National Aging and Disability I&R/A Support Center Services, Survey and Training Opportunities
The National Aging and Disability I&R/A Support Center provides many services, tools and networking opportunities that participants can take advantage of... provided they know about them! This presentation will review the various training initiatives, survey information and network tools the Support Center has to offer. Presenters will review survey data highlights from the recent State of the State for Aging and Disability I&R/A, and aging and disability professionals of all levels should come prepared for an interactive discussion.

Sara Tribe, NASUAD, Washington, DC; Kelsey Walter, NASUAD, Washington, DC

In addition to the sessions listed above, people interested in the Aging and Disabilities Track, may also want to check out:

- Bridging the Mental Health Divide: Aging and Veteran Mental Health Needs, Services and Resources (C-4 in Serving the Military Track)
- Resources for Wounded Warriors, their Families and Caregivers: How the USO Warrior and Family Care and DoD Programs Support Injured Warriors and their Families (C-5 in Serving the Military Track)
- Disaster Management 2020: An Eco-System during Disasters for Service Provision and Why it Makes Sense for Consumers and Providers (Parts One and Two) (D-4 and D-5 in Disaster Track)
- Thinking Outside the Box: Creative Resource Ideas for Return Callers (E-1 in Service Delivery Track)
- I&R in the World of Community-Based Transportation (E-7 in Service Delivery Track)
- Making the AIRS Standards Work for You as a Specialized I&R Provider (F-5 in Management Track)
- The “In’s” and “Out’s” of Inclusion/Exclusion Policies (G-7 in Resource Database Track)
- Oregon’s Trail to Building a Statewide Aging and Disability Resource Center (ADRC) Database (G-8 in Resource Database Track)
- Social Media Essentials for 2013 (H-2 in Technology Track)
- Washington Update: Public Policy and Advocacy (K-2 in For Everyone Track)
Brought to you by 211US Steering Committee

The sessions on this track are geared towards issues distinct to 211. However there may be sessions here of interest to people working in other areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected.

Monday, June 3
10:00am – 11:30am
Pavilion East
B-1: The Campaign to Connect Everyone to Health Insurance Coverage: What 211s Need to Know in this Most Critical of Years

This session will share the vital information and messages all I&Rs need to know around health insurance outreach and enrollment as they prepare for an avalanche of calls that are coming as per the mandates and opportunities of the Affordable Care Act.

Patrick McIntyre, United Way Worldwide, Alexandria, Virginia; Jessica Kendall, Enroll America, Leavenworth, Washington; Donna Cohen Ross, Centers for Medicare and Medicaid Services, Baltimore, Maryland.

Monday, June 3
1:00pm – 2:30pm
Pavilion East
B-2: “211? What Are You Doing Here?” Emergency Management Agencies’ View of 211’s Role in a Disaster and How to Establish or Improve your Relationship with Them

What do emergency managers really think of you and how can you change their perceptions? Understand the critical services that emergency management agencies need from your 211 and how best to promote them. If you want to improve your relationship with your local emergency management agency or you’re starting from scratch, this workshop can help you head in the right direction. Be ready to participate by providing your experiences and current needs or questions about your particular situation in a roundtable discussion.

Doug Quisenberry, 211 LA County, San Gabriel, California.

Monday, June 3
3:15pm – 4:45pm
Pavilion East
B-3: 211 Participation in CDC Flu Pandemic Simulation

How well prepared is the overall 211 network or your local 211 center to respond in a national health emergency? Join a panel that includes the Centers for Disease Control, a state 211 system and two local 211 centers from different states as they describe a pandemic simulation that occurred in February and how the outcome can inform the 211 field moving forward.

Lisa Koonin, Center for Disease Control and Prevention, Atlanta, Georgia; Stephen Wertheim, United Way of Greater Cleveland 211, Cleveland, Ohio; Angela Mora, El Paso Texas 211, El Paso, Texas.

Tuesday, June 4
8:30am – 10:00am
Pavilion East
B-4: 211 Assembly (Part One) All 211 staff are encouraged to attend

a. 211 US Recap
b. Elements of 211 Statewide Systems: Opportunities for Collaboration and Enhancement

State 211 systems offer an opportunity for greater collaboration at the state and national level. This session serves as a discussion around the preferred elements of 211 state systems, the opportunities that those elements provide for individual centers, as well as the national 211 network, the ongoing challenges of managing a state system and ways in which individuals and collectives can work together to support their continual enhancement.

Lilian Coral, 211 California, South Pasadena, California; Laura Marx, 211 New Jersey, East Hanover, New Jersey; Tanya Barrett, 211 Connecticut, Rocky Hill, Connecticut; Lori Linstead, 211 Oklahoma, Oklahoma City, Oklahoma; Troy Hammond, 211info, Portland, Oregon.

Tuesday, June 4
10:30am – 12:00pm
Pavilion East
B-5: 211 Assembly (Part Two) All 211 staff are encouraged to attend

a. Transitioning 211: Quality - Mystery Call Project Results 2012

The 211 system strives for excellence, aspiring that each state system and each individual service provider is first-class by national standards of I&R. This session will focus on promoting “excellence” in quality by reporting the results from the Mystery Call Project 2012 and recommendations based on those findings. In addition, the session will provide a forum for those wanting to discuss their current best practices, and ideas for taking the Mystery Call Project to the next level.

Troy Hammond, 211info, Portland, Oregon.


A list of state best practices will be distributed with highlights shared on specific initiatives such as VITA scheduling, Supportive Services for Veterans, SNAP enrollment and outreach, etc. You are encouraged to bring materials to share to stimulate discussion.

211US Steering Committee Members

c. Statewide Connections: Informal Time with your State Organization and Other 211s

Informal time to chat with other 211s in your state or local region and the state representative about everyone 211 and express the ideas that you found interesting and would like to explore further as a state or region.

Tuesday, June 4
2:15pm – 3:45pm
Pavilion East
B-6: Communicating 211 Value in Terms Others Can Understand

211’s position as an invaluable community institution is cemented when constituents can understand and articulate 211’s value. Hear strategies and tools for measuring and communicating impact and enhancing relationships with two key constituent groups: United Ways and service providers.

Rachael Nygaard, United Way of Asheville and Buncombe County, Asheville, North Carolina; Maricela Alcala, United Way of Greater Toledo, Toledo, Ohio; Erin Goff, United Way of Greater Toledo, Toledo, Ohio.

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Troy Hammond, 211info, Portland, Oregon.


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211US Steering Committee Members

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Informal time to chat with other 211s in your state or local region and the state representative about everyone 211 and express the ideas that you found interesting and would like to explore further as a state or region.

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Rachael Nygaard, United Way of Asheville and Buncombe County, Asheville, North Carolina; Maricela Alcala, United Way of Greater Toledo, Toledo, Ohio; Erin Goff, United Way of Greater Toledo, Toledo, Ohio.
Wednesday, June 5
9:00am – 10:30am
Pavilion East
B-7: 211 Cooperative Relationships: If You Build It, They Will Come!
This session will examine and discuss how to use core I&R infrastructures as a springboard to supporting collaborative efforts in your community. To do this, we’ll examine three key 211 San Diego projects that helped in building strong community relationships and most importantly, helping partners see 211 as more than just a dialing code.
Gabriel Kendall, 211 San Diego, San Diego, California

Wednesday, June 5
10:45am – 12:15pm
Pavilion East
B-8: Coordinated Assessment and Central Intake Through 211
This session is for organizations interested in learning about the new HUD model for Coordinated Assessment and Central Intake. The United Way of Greater Toledo will share their experiences developing and implementing this program. We will cover the description of Coordinated Assessment/Central Intake and also share procedures, assessments, staffing requirements and reporting.
Maricela Alcala, United Way of Greater Toledo, Toledo, Ohio; Erin Goff, United Way of Greater Toledo, Toledo, Ohio; Marta DeLeon, United Way of Greater Toledo, Toledo, Ohio

Wednesday, June 5
2:15pm – 3:45pm
Pavilion East
B-9: 211US Steering Committee Open House – Final Session
Host: Laura Marx, 211 US Steering Committee
This session hosted by members of the 211 US Steering Committee offers an issue-oriented drop-in to provide time for constructive reflection, collaborative problem-solving and final networking. The workshop will be facilitated and an online space will be set-up during the conference for people planning to attend to post “let’s talk about” ideas. We will also be using this as an opportunity to follow-up with issues emerging from the other sessions on the 211 Program Track. If you have questions about national 211 issues, here is the place to ask them.

In addition to the sessions listed above, people interested in the 211 Track may also want to check out:

- The Affordable Care Act: The Current State of the States (A-4 in Aging and Disabilities Track)
- ADRC Options Counselor Collaborations with Medicare Counselors to Provide Medicare Information and Assistance via SHIP (in NW a.k.a. SHIBA): Roles, Opportunities and Collaborative Cross Training to Assist Aging Adults, Caregivers, Veterans and Families (A-10 in Aging and Disabilities Track)
- Hurricane Sandy: Managing Call Surge with I&R Partners (D-1 in Disaster Track)
- Disaster Management 2020: An Eco-System during Disasters for Service Provision and Why it Makes Sense for Consumers and Providers (Parts One and Two) (D-4 and D-5 in Disaster Track)
- Family Assistance Center during a Mass Fatality Event using 211 as the Primary Point of Contact (D-7 in Disaster Track)
- Coordinated Entry for Homeless Families: Concept to Contract (F-3 in Management Track)
- Impactful Reports Made Easy and Pretty with MS Excel (H-4 in Technology Track)

The sessions on this track are geared towards issues related to Serving the Military and their family members. However there may be sessions here of interest to people working in other areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected.

Monday, June 3
10:00am – 11:30am
Counsel Suite
C-1: Bridging the Gap from Military Service to Civilian Life
All service members struggle with the transition from active duty back to civilian life. This struggle is natural, but is aggravated by a lack of knowledge about the many resources available. The federal government and many non-profits offer a variety of programs and tools to help veterans find employment, pursue education and training, or reintegrate with the civilian community. However, many of these resources are only marketed to military personnel so many I&R professionals are unaware that they are available. This workshop will help identify many of the resources available and how I&R professionals can help veterans access them.
Lucinda Lorei, Marine and Family Programs, Headquarters US Marine Corps, Quantico, Virginia

Monday, June 3
1:00pm – 2:30pm
Counsel Suite
C-2: What Can We Do? How We, Together, Can Support Those who Defend our Nation
When it comes to America’s military forces and their families, if you have ever asked what can we do, then this workshop is for you and your team. Service members are located not only on military installations but throughout America on independent duty tours or special duty assignments. Often these tours are in remotely located areas miles away from the resources traditionally accessible to service members and their families when near an installation. Supporting our forces and their families in communities is vital to Force Preservation. What Can We Do provides information on how we, together, can support those who defend our nation.
Deanna Dalton, 211info, Portland, Oregon

Monday, June 3
3:15pm – 4:45pm
Counsel Suite
This workshop explores what resources and programs are available to support military spouses and children as they encounter the challenges of the mobile military lifestyle. Children have to deal with deployed parents, changing schools every three years, frequent moves and
sometimes even the death of a parent. How do spouses juggle financial pressure, single parenting, marriage stresses, and isolation and loneliness during deployments? What programs are in place to help them? This workshop will outline the programs that support military families, specifically by providing education and employment opportunities to the spouses; free family counseling; resources for children which include online blogs, free online homework tutoring and many more. We will also outline what programs support families of the fallen and how to connect these families to the programs. Details will be provided about what free counseling services are provided through on-base programs and Military One Source.

Lucinda Lorei, Marine and Family Programs, Headquarters US Marine Corps, Quantico, Virginia

**Serving the Military Track**

**C-4: Bridging the Mental Health Divide: Aging and Veteran Mental Health Needs, Services and Resources**

This session on access to mental health services and supports is aimed at I&R professionals who come into contact with older adults, veterans of any age and their caregivers. With perspectives from the Veterans Affairs Medical Center of Portland, Oregon, and the California Elder Mental Health and Aging Coalition, co-presenters will review mental health needs specific to veteran and older adult populations; and the services, coalitions, and advocacy that I&R professionals can employ to assist them.

David Greaves, Mental Health and Clinical Neuroscience Division, Portland Veterans Affairs Medical Center, Portland, Oregon; Viviana Criado, California Elder Mental Health and Aging Coalition, California

**Wednesday, June 5**

10:45am – 12:15pm

**C-7: Community Partnerships for Veterans with Disabilities: Veteran Directed Home and Community Based Services (VDHCB) and Beyond**

Many veterans transition from a military culture to living within our communities in the “civilian world.” For some veterans that transition may be difficult if services and supports are needed to adjust to that civilian world. It is the responsibility of the community to recognize the sacrifices these men and women have made on our behalf. If the veteran has disabilities, this only strengthens the need to access services and supports. Integrating our veterans into our communities and providing the needed supports can be accomplished with innovative program ideas and implementation and the desire of the community to “give back” in recognition of their service.

Barbara Diehl, Prince William Area Agency on Aging, Woodbridge, Virginia

**Disaster Track**

The sessions on this track are geared towards Disaster issues. However there may be sessions here of interest to people working in other areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected.

**Monday, June 3**

10:00am – 11:30am

**Broadway 3&4**

**D-1: Hurricane Sandy: Managing Call Surge with I&R Partners**

Every call center has a time when systems are down or call volume surges beyond capacity. Learn how NJ 211 survived during Hurricane Sandy because of technologies and partnerships with Houston, Vermont and Palm Beach. NJ 211 will define the planning process to activate back-up systems and supporting technologies in the event of a large scale call surge, such as occurred with Hurricane Sandy, in addition to sharing a planning template, activation checklists and protocols. United Way of Houston 211 will share how to prepare to receive calls, the technologies, and supportive protocols. Discussion will continue around the pros and cons of sharing disaster resources, reporting trials and errors, and data collection. Each workshop participant will have a back-up strategy sheet to complete for their own center or system, leaving the workshop with a continuity of operations back-up plan for exploration and implementation.

Laura Marx, NJ 211 Partnership, Whippany, New Jersey; David Jobe, United Way of Greater Houston, Houston, Texas
D-2: Introduction to Psychological First Aid: Find Your Chi in a World of Chaos! (Part One)
Learn the basic principles and techniques of Psychological First Aid (PFA), an evidence-informed approach designed to foster resilience and reduce the initial distress caused by traumatic events. Find out how the core actions of PFA intersect with I&R services. This session also includes self-discovery of who you are in the work, self-care and safety planning.
Bonnie Bush, 211 & Suicide Prevention Services, Crisis Center of Tampa Bay, Tampa, Florida; Debra Harris, 211 & Suicide Prevention Services, Crisis Center of Tampa Bay, Tampa, Florida

Tuesday, June 4
10:30am – 12:00pm
Broadway 3&4
D-4: Disaster Management 2020: An Eco-System during Disasters for Service Provision and Why it Makes Sense for Consumers and Providers (Part One)
During disasters nonprofit, private and public sector organizations play a critical role in delivering services to those affected. The session will discuss the most critical aspects necessary for I&Rs to create the necessary “ecosystem” to serve this vulnerable population. The topics discussed will be operations, staff management, reporting, training, communications and technology/telephony.
Richard LaPratt, VIA LINK 211, New Orleans, Louisiana; Aaron Blackledge, AIRS, Baton Rouge, Louisiana

Tuesday, June 4
1:15pm – 3:15pm
Parlors B&C
E-1: Thinking Outside the Box: Creative Resource Ideas for Return Callers
This workshop is intended to help I&R specialists work efficiently
and effectively with callers who return to the agency upon facing challenges once standard resources are exhausted. Case scenarios and/or audio snippets will be used to illustrate these types of calls. The target audience includes anyone who engages in I&R, or who has an interest in the seamless operation of an I&R center, particularly one that serves older adults and adults with disabilities. Attendees will learn to exercise creative thinking when locating resources, as well as expand their knowledge of helpful language and resources that may better serve their callers.


Monday, June 3
1:00pm – 2:30pm
Parlors B&C

E-2: Cultural Competency: Ethical Considerations on Reaching Latino Population
The session goal is to have all human service workers understand the depth of influence Latino culture has on the population and the ethical requirements, based on a code of ethics, a practitioner must achieve to ensure appropriate client-specific intervention and referrals.

Alejandro (Alex) Zamora, 211 Idaho CareLine, Idaho Department of Health and Welfare, Boise, Idaho

Monday, June 3
3:15pm – 4:45pm
Parlors B&C

E-3: When You’re Stumped: Providing Creative I&R
Because so many trees were cut down to build Portland it was nicknamed Stumptown. But, being resourceful, Portlanders used the stumps to get about town without walking in the mud. Sometimes I&R work can seem that way. Consumers have needs but the means to meet those needs seem to not exist. This workshop is intended to be a forum where we can share our creative I&R moments and develop strategies to help keep our feet out of the mud of frustration while empowering our consumers.

John Plonski, Suicide Prevention Coalition of Long Island, Hicksville, New York

Tuesday, June 4
8:30am – 10:00am
Parlors B&C

E-4: Rapport: Making the Connection
Rapport is the key to a successful interaction with any inquirer. When you have a solid connection with an inquirer, it opens the door for assessment, empowerment, and making good referrals. Come and learn how to make these connections or train your staff on how to make these connections through tools, practice, and fun games that demonstrate the power of rapport.

Jackie Mitchell, 211 LA County, San Gabriel, California

Tuesday, June 4
10:30am – 12:00pm
Parlors B&C

E-5: Community-wide Common Intake
Stark County, Ohio has implemented a community-wide common intake system among United Way funded Emergency Assistance Providers which allows our I&R to screen clients for service provision and assists in the prevention of duplication. This workshop will focus on how organizational and system barriers were identified, addressed and conquered. A live demonstration of the system will be given.

Sherri McKinney-Frantz, United Way of Greater Stark County, Canton, Ohio

Tuesday, June 4
2:15pm – 3:45pm
Parlors B&C

E-6: Chat & Text: A New Way to Access I&R
Do you want to connect to clients unable or unwilling to reach out by phone due to hearing impairments or perceived stigma? Chat and Text can be used successfully with clients looking for referrals or in crisis. We will share our best practices, the challenges we faced, how we overcame them and our plans on moving forward.

Carae Jewell, Heart of Florida United Way, Orlando, Florida; Larry Ohness, Heart of Florida United Way, Orlando, Florida

Wednesday, June 5
9:00am – 10:30am
Parlors B&C

E-7: I&R in the World of Community-Based Transportation
Few will argue that access to reliable transportation is anything less than a basic human need. For older adults, people with disabilities, combat veterans returning from the battlefield, and others, access to transportation, or the lack thereof, can mean the difference between living an active and independent lifestyle and one of reliance and social isolation. This presentation will highlight some of the challenges associated with the development and delivery of transportation options that meet the varying needs of an aging America, the America that seeks to include people with disabilities, as well as the America that owes a debt to her men and women in uniform. Ride Connection, a private non-profit, serving the Portland, Oregon metro area, has provided transportation services for the better part of three decades. Our history has been one of continual growth and constant evolution. The presentation, facilitated by the agency’s Chief Operating Officer and its Mobility Manager, provides an overview of Ride Connection as a provider and as an innovator in the field of community based transportation. Session participants will come away with an understanding, if not an affinity for, a wide range of potential transportation solutions; many of which could be replicated in nearly any community. Participants will also learn about the critical I&R processes that are at the heart of the Ride Connection service delivery model.

Julie Wilcke, Ride Connection, Inc., Portland, Oregon; Mike Mullins, Ride Connection, Inc., Portland, Oregon

Wednesday, June 5
10:45am – 12:15pm
Parlors B&C

E-8: Compassion Fatigue: Caring for Self While Caring for Others
Those working in social services talk with people every day who are facing trying and desperate circumstances. The stress of those situations can begin to encroach on individuals who are service...
providers, affecting their health and ability to serve clients. In this session, we will identify compassion fatigue and its symptoms, and look at various aspects of self-care so we can continue doing our work in a sustainable way.

Yvonne Simpson, Crisis Clinic of Seattle/211 King County, Seattle, Washington

In addition to the sessions listed above, people interested in the Service Delivery Track may also want to check out:

- Understanding the Unique Challenges Faced by Lesbian, Gay, Bisexual and Transgender (LGBT) Older Adults (A-6 in Aging and Disability Track)
- Mission Accessible: Disability Rights and Culture 101 (A-7 in Aging and Disability Track)
- ADRC Options Councilor Collaborations with Medicare Counselors to Provide Medicare Information and Assistance via SHIP (in NW a.k.a. SHIBA):
- Roles, Opportunities and Collaborative Cross Training to Assist Aging Adults, Caregivers, Veterans and Families (A-10 in Aging and Disability Track)
- Serving Hard-to-Reach Populations: Improving Cultural Competency, Outreach and Service Access (A-11 in Aging and Disability Track)
- Where’s Waldo – Finding the Root Need and the Best Available Resource (A-14 in Aging and Disability Track)
- Bridging the Gap from Military Service to Civilian Life (C-1 in Serving the Military Track)
- How do Families Keep Up? How Community Support Works in the Military (C-3 in Serving the Military Track)
- Access to VA Benefits and Vocational Rehabilitation and Employment/Chapter 31 Benefits (C-6 in Serving the Military Track)
- Community Partnerships for Veterans with Disabilities: Veteran Directed Home and Community Based Services (VDHCBS) and Beyond (C-7 in Serving the Military Track)
- Introduction to Psychological First Aid: Find Your Chi in a World of Chaos! (Parts One and Two) (D-2 and D-3 in Disaster Track)
- Learn how Texting Works for I&R, Family Health, Emergency Shelter Programs and During Disasters (H-7 in Technology Track)
- Breaking it Down: How to Achieve AIRS Accreditation (K-1 in For Everyone Track)
- Reaching and Connecting Populations Most at Risk for Poor Health Outcomes in the Community (K-8 in For Everyone Track)

The sessions on this track are geared towards I&R Management issues. However there may be sessions here of interest to people working in other areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected!

Monday, June 3
10:00am – 11:30am
Galleria 2
F-1: Best Practices for Successful Community Collaborations: A Simulated Partnership Experience
This workshop will begin with an overview of the best practice elements for building a solid foundation for sustaining community partners and strengthening existing community partnerships. Management staff will learn how to continually work to promote the reciprocity of partnerships using best practices to systematically provide feedback and assessment to one another as community partners.
Katherine Delgado, Family and Children’s Service, TN 211, Nashville, Tennessee

Monday, June 3
1:00pm – 2:30pm
Galleria 2
F-2: Is It Good Enough? Evaluating & Modifying Your Call Center Training Curriculum to Meet the Needs of Your Clients and Mission
How do you know if your call center training curriculum meets the needs of your staff, your clients and your organization’s mission? During this lively, interactive training session, participants will learn techniques to help evaluate and modify staff training, and improve employee and client retention.
Tonya Wiley, United Way of Connecticut/211, Rocky Hill, Connecticut

Monday, June 3
3:15pm – 4:45pm
Galleria 2
F-3: Coordinated Entry for Homeless Families: Concept to Contract
Are you involved or thinking about getting involved with coordinated entry for homeless families? Come share what you have learned and experienced, and learn what we have done to take coordinated entry from concept to contract. While there are many ways to design a coordinated entry approach, there are some common foundations that need to be built to have a successful program. We will share our story and outcomes and look forward to opening up the conversation for others to share their experiences and learning.
Amy Latzer, 211 LA County, San Gabriel, California; Christopher Castillo, 211 LA County, San Gabriel, California

Tuesday, June 4
8:30am – 10:00am
Galleria 2
F-4: How to Develop and Implement an Internship Program
Over the past four years, Info Line of Akron has developed an extensive internship program to support many aspects of its I&R program. This session will describe all the steps needed to develop an internship program and provide you with the tools to implement one at your agency. There will also be time for small group discussion on specific topics related to the development of an internship program. This session is best suited for call centers that have sufficient supervisory staff to support an internship program.
Tonya Kahl, Info Line, Akron, Ohio

Tuesday, June 4
10:30am – 12:00pm
Galleria 2
F-5: Making the AIRS Standards Work for You as a Specialized I&R Provider
AIRS Standards may seem daunting for those of us who work
at smaller organizations serving specific populations. However, collaboration and creative thinking can lead to great successes making these Standards work for specialized I&R/I&A providers. This session will build upon the experience of BIA Washington as they established a standards-driven I&R/I&A Resource Center.

Jessica Giordano, Brain Injury Association of Washington, Seattle, Washington

Tuesday, June 4
2:15pm – 3:45pm
Galleria 2
F-6: Training or Supervision: Determining the Root Cause of Performance Compliance Issues

“More training!” is often the refrain of management when employees are not performing well. It is true that training can address a myriad of issues. Also true is that supervision and coaching need to be considered if training has been applied and the situation is not resolved. In this workshop, you will learn how to determine employee training needs and implement training plans according to the learning styles of each individual. The workshop will address what steps to take when training is not the issue and the supervisor needs to take appropriate action to resolve the situation.

Sandra Ray, United Way of Greater Houston, Houston, Texas

Wednesday, June 5
9:00am – 10:30am
Galleria 2
F-7: Not just a Standard - Program Evaluation and Quality Assurance

An overview of I&R program evaluation and outcome indicators, quality assurance tools used by I&R programs including program effectiveness follow-up, silent call monitoring, call accounting data and some less common measurements like agency satisfaction feedback. Within the context of the AIRS Accreditation Criteria, the presenters will demonstrate instruments, processes, measurements and how the tools help strengthen and demonstrate the impact of I&R services. Participants will be provided an opportunity to analyze quality assurance data and identify steps or solutions to problems identified.

Robert McKown, Heart of West Michigan United Way, Grand Rapids, Michigan; Sherri Vainavicz, Heart of West Michigan United Way, Grand Rapids, Michigan

Wednesday, June 5
10:45am – 12:15pm
Galleria 2
F-8: Three Things you Need to Know About Leveraging Mutually Beneficial Partnerships: Sustaining Innovative Programs in the I&R World

Join us as we review a case study of 211 San Diego’s breast health component of their Healthcare Navigation Program to assess the three major factors that helped them develop a partnership with Susan G. Komen for the Cure. Get a first-hand look into this innovative partnership that leveraged their expansive reach to women (73% of callers) to sustain a full-time healthcare navigator, equip their organization with a breast health expert, educate thousands of women about taking preventive action for their health, literally saving lives, and drive clients to our I&R, all while leveraging the Komen brand.
to improve 211 San Diego’s credibility among healthcare providers and the general community. Learn about the key steps, including knowing your callers through the data which is necessary to make this happen and reflecting on your own community to assess if and how this can become possible for your organization. If you’re interested in identifying and creating sustainable funding opportunities, networking with funders and partners in the community, please come and join us for this creative and fun session!

Jessica Rodgers, 211 San Diego, San Diego, California

Wednesday, June 5
2:15pm – 3:45pm
Galleria 2

F-9: All Things I&R Management Open House – Final Session
Host: Faed Hendry, Findhelp Information Services, Toronto, Ontario; Clive Jones, AIRS, Sooke, British Columbia

This final after-lunch session serves as an issue-oriented drop-in to provide time for final networking and to try and find answers to any yet-unanswered questions. The workshop will be facilitated and an online space will be set-up during the conference for people to post “let’s talk about” ideas if they are planning to attend. If there are any topics that you still have questions on, this is a time when you can get those questions answered.

In addition to the sessions listed above, people interested in the I&R Management Track may also want to check out:

- The Affordable Care Act: The Current State of the States (A-4 in Aging and Disability Track)
- Navigating the Road of Transportation Options (A-8 in Aging and Disability Track)
- 211 Cooperative Relationships: If You Build It, They Will Come! (B-7 in 211 Track)
- Coordinated Assessment and Central Intake through 211 (B-8 in 211 Track)
- Cultural Competency: Ethical Considerations on Reaching Latino Population (E-2 in Service Delivery Track)
- Community-wide Common Intake (E-5 in Service Delivery Track)
- Compassion Fatigue: Caring for Self While Caring for Others (E-8 in Service Delivery Track)
- Hitching up your Team: How to Successfully Combine Resource Databases from Multiple I&R Agencies (G-2 in Resource Database Track)
- Resource Check-up & Diagnosis - Conducting a Database Audit (G-3 in Resource Database Track)
- The “Ins” and “Outs” of Inclusion/Exclusion Policies (G-7 in Resource Database Track)
- Social Media Essentials for 2013 (H-2 in Technology Track)
- Serving the Underserved on the Web (H-3 in Technology Track)
- Impactful Reports Made Easy and Pretty with MS Excel (H-4 in Technology Track)
- I&R’s David to Google’s Goliath: How to Leverage a Niche and be our Clients’ Go-To Search Engine (H-8 in Technology Track)
- Washington Update: Public Policy and Advocacy (K-2 in For Everyone Track)
- From Aspirations to Outcomes: Building and Sustaining Effective Collaboration (K-4 in For Everyone Track)
- Revised AIRS Standards And Quality Indicators for Professional Information and Referral - Version 7.0 (K-6 in For Everyone Track)
- Worksite Wellness: Shape up your Agency (K-7 in For Everyone Track)

The sessions on this track are geared towards Resource Database issues. However there may be sessions here of interest to people working in other areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected.

Monday, June 3
10:00am – 11:30am

Galleria 3

G-1: Resource 101 Database Semi-Cavalcade
Lost in a quagmire of jumbled data? Found but eager to assess the greenness of the procedural grass on the other side? Expert but entertained by laughing at less competent resource specialists? Sidle up to Matt and his session. Gasp as an inclusion/exclusion policy is conjured out of the ether! Marvel as chaos is transformed into order through the sorcery of data elements and style! Cower in the looming shadow of the world’s most grotesque data classification errors! Look at two overweight guys named Matt giving a presentation! All are welcome! Free Q&A for any brave enough to endure the entire adrenaline-spraying spectacle!

Matt Finley, United Way of Greater Cleveland, Cleveland, Ohio; Matt Trahan, United Way of Greater Cleveland, Cleveland, Ohio

Monday, June 3
1:00 pm – 2:30pm

Galleria 3

G-2: Hitching up your Team: How to Successfully Combine Resource Databases from Multiple I&R Agencies
Learn from the trials and triumphs of resource staff that have successfully combined local databases from multiple I&R agencies into a single, cohesive regional resource database and lived to tell the tale. As more agencies are joining forces to better serve their collective client bases, resource staff and management at all stages of their careers may be faced with this daunting task. Here is your chance to pick the brains of those who have gone before you to find out how to put your database merger on a smoother path.

Steve Eastwood, 211 Arizona, Phoenix, Arizona; Crystal Renew, Aiken County HELP LINE 211, Aiken, South Carolina; Hannah Newton, Crisis Clinic of Seattle/King County 211, Seattle, Washington; Debi Smith, Texas Information and Referral Network 211, Austin, Texas; Erin Shilcutt, United Way of Abilene, Abilene, Texas

Monday, June 3
3:15pm – 4:45pm

Galleria 3

G-3: Resource Check-up & Diagnosis, Conducting a Database Audit
Do you have confidence that your database includes the “right” resources, is classified appropriately for services, or that your resource specialists are following your style guide consistently? Panel members will present information about their approaches to using various audit tools to evaluate and improve their I&R resource database.
To help new users of the Taxonomy understand using taxonomy terms to index services and to dispel myths, discuss roadblocks and possible solutions to coding issues.

Robin Pokojski, United Way 211 Missouri/Southwest Illinois, St. Louis, Missouri; Cathy Vaisvil, United Way 211 Missouri/Southwest Illinois, St. Louis, Missouri

G-8: Oregon’s Trail to Building a Statewide Aging and Disability Resource Center (ADRC) Database

Representatives from the Oregon Department of Human Services in conjunction with regional I&R staff, will discuss their experience building a statewide resource database. The panel will focus on the policy and technology considerations stakeholders had to confront. Any I&R professional that is or will be involved in consolidating resource directories or purchasing new technologies should attend.

Patty McGovern, Multnomah County Aging and Disability Services (ADS), Portland, Oregon; Suanne Jackson, Oregon State Unit on Aging, Salem, Oregon

Wednesday, June 5
10:45am – 12:15pm
Galleria 3
G-9: Resource Database Open House – Final Session

Hosts: Polly Fay, Institute for Human Services/211 HELPLINE, Bath, New York; Matt Finley, United Way of Greater Cleveland, Cleveland, Ohio

This session offers an issue-oriented drop-in to provide time for constructive reflection, collaborative problem-solving and final networking. The workshop will be facilitated and an online space set-up during the conference for people to post “let’s talk about” ideas if they are planning to attend. We will also be using it as an opportunity to follow-up with issues emerging from the other sessions on the Resource Database Track or any unanswered questions still remaining.

In addition to the sessions listed above, people interested in the Resource Database Track may also want to check out:

- I&R’s David to Google’s Goliath: How to Leverage a Niche and be our Clients’ Go-To Search Engine (H-8 in Technology Track)
- Beyond the Call Center – Using the I&R Resource Database to Interact with Clients, Agencies, and Community Members (K-5 in For Everyone Track)

The sessions on this track are geared towards I&R Technology issues. However there may be sessions here of interest to people working in other areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected.

Monday, June 3
10:00am – 11:30am
Forum Suite
H-1: Effective Web Strategies

Learn how to utilize effective web strategies to better reach your target audience. This session will cover social media marketing, taxonomy, effective search engine optimization, and mobile integration. Brian Jamison, CEO of OpenSourcery, lends his expertise and will highlight...
how his Drupal-based firm implements these techniques on a daily basis.
Brian Jamison, Open Sourcery, Portland, Oregon

Monday, June 3
1:00pm – 2:30pm
Forum Suite
H-2: Social Media Essentials for 2013
Learn what social media strategies are working in 2013. With a mix of theory, strategy and tactical advice you'll leave with a plan that'll wow your colleagues and help you connect with those you need to reach in order to thrive. In particular, we'll explore concepts such as: content marketing, converged media and branding.
Matt Kinshella, 211info, Portland, Oregon

Monday, June 3
3:15pm – 4:45pm
Forum Suite
H-3: Serving the Underserved on the Web
The internet has come a long way since its conception. But for some, it still leaves a lot to be desired. Join us as we explore the needs of the internet's most underserved community members. Low literacy adults, smart phone web users: don't let these valuable markets go unnoticed! This session will teach you how you can incorporate strategic design, user interface, and custom content to reach the full extent of your audience base.
Andrea Beithon, Open Sourcery, Portland, Oregon

Tuesday, June 4
8:30am – 10:00am
Forum Suite
H-4: Impactful Reports Made Easy and Pretty with MS Excel
Does it take you a long time to create a compelling report of your I&R data? No more! In this session, you'll learn how to use MS Excel to create compelling reports that are easy to produce and that look good for maximum impact. Learn how to use Excel to build Heat Maps, push your Excel reports to iPhone apps with ease, create a dashboard report for any funded program, use 5 easy Excel functions to be a data analysis expert and build a pivot tables that give meaning to your data. Whether you are a manager or a data guru, you will learn something useful. Some familiarity with Excel is recommended.
Ray Thompson, VisionLink, Inc, Boulder, Colorado

Tuesday, June 4
10:30am – 12:00pm
Forum Suite
H-5: The Open Source Panel
What is open source and why should we care? Learn from non-profit organizations who have taken advantage of this technology in order to create powerful websites that deliver results on a limited budget.
Delona Lang, Open Sourcery, Portland, Oregon; Matt Kinshella, 211info, Portland, Oregon; Shelley Marchesi, Home Forward, Portland, Oregon; Genevieve Ellis, Coalition of Community Health Clinics, Portland, Oregon; Cheryl Edmonds, CANnect, Portland, Oregon

Tuesday, June 4
10:30am – 12:00pm
Broadway 1&2
H-6: Mobile I&R: There’s an App for That!
If you have a Wi-Fi-enabled mobile device, you’ve likely experienced the wide variety of apps for games, productivity, and information. Yes, you read that correctly, information! This session will provide a basic introduction to mobile technology, provide information on what I&R apps are available currently, and talk about how your agency can make custom-branded apps available to your communities. A panel of folks will answer your questions about their experiences with providing information to their communities via this relatively new medium.
Lilian Coral, 211 California, South Pasadena, California; Deb Petty, Bowman Systems, Shreveport, Louisiana; Mari Morris, 211 North Carolina, Cary, North Carolina; Catherine Rea Dunning, 211 Arizona, Phoenix, Arizona; Susan Gemmel, Crisis Clinic of Seattle/211 King County, Seattle, Washington

Tuesday, June 4
2:15pm – 3:45pm
Forum Suite
H-7: Learn How Texting Works for I&R, Family Health, Emergency Shelter Programs and During Disasters
Texting is exploding across North America. Attendees will learn exactly how to provide text services and will understand the ease with which texting can become part of their I&R services from initiation to training to full uses with outlined costs and associated resource allocation.
Matt Kinshella, 211info, Portland, Oregon; Arwen Okalani, 211info, Portland, Oregon; Jonathan Holly, Educational Message Services (EMS), Ventura, California

Wednesday, June 5
9:00am – 10:30am
Forum Suite
H-8: I&R’s David to Google’s Goliath: How to Leverage a Niche and be our Clients’ Go-To Search Engine
The challenge for any business is to create a functional, user friendly website that entices your visitors to stay on your site and return for another experience. Additionally, for I&R providers, how do you manage the public users experience searching your database online? How do you ensure your visitors can actually find the information and referrals that they need? This experienced panel will discuss focusing your database-driven website in order to better help people more easily find the information and referrals that they seek. Attendees will leave with a greater understanding of the techniques and tools available to increase usability of searching for available community services through your company’s website.
Polly Fay, Institute for Human Services/211 HELPLINE, Bath, New York; Matt Kinshella, 211info, Portland, Oregon; Edward Perry, 211 Tampa Bay Cares, Clearwater, Florida; Dawn Rustrum, Aging and Disability Resource Connection (ADRC) of Oregon, Salem, Oregon
Wednesday, June 5
2:15pm – 3:45pm
Galleria 1
H-9: I&R Technology Open House – Final Session
Host: Matt Kinshella, 211infoLine, Portland, Oregon
This final session serves as an issue-oriented drop-in to provide time for constructive reflection, collaborative problem-solving and final networking. The workshop will be facilitated and an online space will be set-up during the conference for people to post “let’s talk about” ideas if they are planning to attend. If you want a final chance to check-in with your technical peers to share challenges and potential solutions, you should attend this session.

In addition to the sessions listed above, people interested in the Technology Track may also want to check out:
- Chat & Text: A New Way to Access I&R (E-6 on Service Delivery Track)

The sessions on this track could potentially either fit onto other tracks or fit onto no other track. There will be sessions here of interest to people working in all areas of I&R. Remember, anybody can attend anything and that everything in I&R is connected.

Monday, June 3
10:00am – 11:30am
Galleria 1
K-1: Breaking it Down: How to Achieve AIRS Accreditation
This workshop will provide information and tips for achieving AIRS Accreditation. Part of the session will cover the Consultation Phase. The majority of organizations that apply for accreditation are “accreditable,” but many have deficiencies in their applications that make it necessary for them to go through a second round. Participants will learn about the most common mistakes to avoid in an application, as well as hear what reviewers want to see. The second half of the session will discuss the Remote Database Review phase, one of the newer aspects of achieving Accreditation. A well-constructed database is your foundation for good I&R! We will cover each of the 6 Resource Database Standards and explain the expectations for a successful review. We will also provide tips for how to prepare for the database review.
Fred Koss, AIRS Contractor, Chicago, Illinois; Cathleen Dwyer, CDK Consulting, New York; Carol Davis, AIRS Contractor, Brattleboro, Vermont

Monday, June 3
1:00pm – 2:30pm
Galleria 1
K-2: Washington Update: Public Policy and Advocacy
2013’s Washington Update will review the federal legislation critical to I&R/A this year. The discussion will focus on the Older Americans Act, the Affordable Care Act and other relevant bills. It will discuss reauthorization of the Older Americans Act, funding for I&R services within the Affordable Care Act, and advocacy strategies for AIRS members to get involved with these pieces of legislation.
Robert (Bob) Blancato, Matz, Blancato & Associates, Washington, DC

Monday, June 3
3:15pm – 4:45pm
Galleria 1
K-3: Laughter Yoga in the Workplace: Laughing At Work Makes Business Sense
Happy employees are productive employees. They achieve more, suffer less stress and take less sick leave. This workshop will discuss the various physical, emotional and social benefits of laughter along with the history of therapeutic laughter and Laughter Yoga. We will end with an actual Laughter Yoga session. Various tools and resources will be explored so that you can take laughter back to your workplace! Having a workplace laughter program can improve employee retention and performance.
Andréa Crisp, Laughter Coach, Laughter Yoga Teacher & EFT-Int Candidate, Portland, Oregon

Tuesday, June 4
8:30am – 10:00am
Galleria 1
K-4: From Aspirations to Outcomes: Building and Sustaining Effective Collaboration
Many nonprofits today are looking for ways to work together to save money, increase effectiveness and extend their reach. With proper planning and structure, collaborative initiatives can meet the needs of all organizations involved. Participants of this workshop will discuss various levels of collaboration and then utilize the tools and techniques provided to develop the framework for their own successful collaborative efforts.
Patrick J. Rogers, Institute for Human Services, Bath, New York

Tuesday, June 4
10:30am – 12:00pm
Galleria 1
K-5: Beyond the Call Center, Using the I&R Resource Database to Interact with Clients, Agencies, and Community Members
I&R management professionals take your valuable database beyond the call center. We will demonstrate its use in printed form for targeted populations – homeless persons, disconnected youth, students. You will learn its use in targeted websites and in direct client service delivery in partnership with other human service agencies.
Lindsey Younger, Resource Genese, Flint, Michigan; Tina Marie Hubbard, Resource Genese, Flint, Michigan; Kasiie White, Resource Genese, Flint, Michigan

Tuesday, June 4
2:15pm – 3:45pm
Galleria 1
K-6: Revised AIRS Standards and Quality Indicators for Professional Information Referral, Version 7.0
This workshop will provide a discussion and explanation of the changes to the AIRS Standards and Quality Indicators for Professional Information & Referral and how they relate to the provision of quality I&R.
Bob McKown, Heart of West Michigan United Way, Grand Rapids, Michigan; Charlene Hipes, AIRS, Portland, Oregon
Wednesday, June 5
9:00am – 10:30am
Galleria 1
K-7: Worksite Wellness: Shape up your Agency
The workshop is designed for agencies looking to start or improve a
Wellness Program. Come learn how to get started regardless of the size
or budget of your agency. Your wellness program can be tailored to your
needs & goals with some simple steps that any agency can do with a
little creativity and motivation. This workshop will be very interactive
and anyone will be able to participate. Participants should be ready for
a light, short, workout, so dress in comfortable shoes (tennis) and work
out or loose clothing is suggested.
Rudy Bernal, 211 LA County, San Gabriel, California; Catherine Abbott,
211 LA County, San Gabriel, California

Wednesday, June 5
10:45am – 12:15pm
Forum Suite
K-8: Reaching and Connecting Populations Most at Risk for
Health Outcomes in the Community
The workshop will focus on the application of the Pathways HUB
model to the I&R service system. The model provides strategies to
identify target groups most at risk of poor health outcomes in the
community, confirm their connection to appropriate services and
measure the results.
Patricia Herrera, 211 LA County, San Gabriel, California

Movie Nights
Feel like staying in or grabbing a meal at the food carts and then
relaxing at the hotel? Join us for two very special movies.

Monday, June 3
8:00pm – 8:30pm
Broadway 1&2
“Tell Me Where to Turn”
Originally filmed 1969 as a Public Affairs Committee film on
Information and Referral Services. This film was designed to show how Information and Referral Services
help tear down the walls between people who need help and people
whose job it is to give help, by bringing them together for the best
interests of the community. The film stimulates understanding and
encourages interest which hopefully will lead to action: to develop such
a service in a community where none exists, or to strengthen an already
existing service to make it meet community needs more efficiently and
economically.

Through vignettes of seven men and women and a child,
reflecting varied problems, the film shows how the trained social
worker in the Information and Referral Service is able to bridge the
gap between these people who do not know where to turn for help,
and local health and social welfare agencies which do exist and are able
and willing to provide the help. The film shows, too, how the referral
worker can uncover unmet community needs, and spur creation of new
services or broadening of old ones.

Tuesday, June 4
8:00pm – 9:30pm
Broadway 1& 2
“American Winter”
Produced and directed by HBO and Emmy award-winning filmmakers,
Joe and Harry Gantz, American Winter is a documentary that follows
the personal stories of families struggling in the aftermath of the worst
economic crisis since the Great Depression. Filmed in 2011 -2012,
over the course of one winter in Portland, Oregon, American Winter
presents an intimate and emotionally evocative snapshot of the state of
our economy as it is playing out in many American families.

Working together with 211 info in Portland, the filmmakers were
given full access to monitor and record calls from distressed families
who were calling 211’s emergency hotline in search of help. The film
follows multiple families in their daily struggle to keep their heads
above water, while facing overwhelming challenges and dwindling
resources available to help them, creating a powerful firsthand view of
Americans caught in today’s financial undertow.

The experiences of the families in American Winter are a vivid
illustration of what has been happening to families across America,
including working families losing their homes, people who remain
jobless or underemployed, children going hungry, families getting
their heat shut off in the dead of winter, and people with health issues
overwhelmed by medical costs.
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iCarol is modern, web-based I&R software that fully supports the AIRS standards and taxonomy. 35,000 people at hundreds of help lines worldwide use iCarol to log millions of calls, including 10 state and provincial 211 networks. With iCarol, you can quickly deploy live chat and 2-way texting/SMS, integrate with telephone systems, and gain access with mobile devices. We’ve converted clients from all other major I&R software vendors as well as many custom-built systems and our experts help you navigate the entire transition. Our clients rave about iCarol’s responsive support team, agility with new features, and a modern easy-to-use interface.

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The Eldercare Locator is the first step to finding resources for older adults in any U.S. community and a free national service funded by a grant from the U.S. Administration on Aging (AoA). The Eldercare Locator is administered by the National Association of Area Agencies on Aging (n4a). Call 800.677.1116 or visit www.eldercare.gov.

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Harmony Information Systems provides off-the-shelf solutions for managing the delivery of home- and community-based, long-term care. The company’s software is used by more than 1,000 human services organizations to improve service delivery efficiency, ensure compliance with funding source requirements, and enable consumer-driven care delivery models. For more information visit www.harmonyis.com or call 866.951.2219.

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Breaking New Ground Resource Center
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www.agrability.org
JoBeth Rath
jbrath@avb-goodwill.com
AgrAbility is a program sponsored by the U.S. Department of Agriculture that provides assistance to farmers, ranchers, other agricultural workers impacted by disability caused by injury or chronic conditions. The program consists of the National Project and State/Regional projects (currently serving 25 states), each involving collaborative partnerships between land grant universities and various nonprofit disability and service organizations. Goodwill of the Finger Lakes participates in the National AgrAbility Project as the disability partner, working to link state and regional projects, as well as states without projects, with a network of resources to provide services to those in need.

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The National Association of Area Agencies on Aging (n4a) is the leading voice on aging issues for Area Agencies on Aging and a champion for Title VI Native American aging programs. Through advocacy, training and technical assistance, we support the national network of AAAs and Title VI programs.

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Come see how our AIRS and HIPAA compliant tools and our supportive staff can help your organization’s technology efforts succeed. Products for 211, Information and Referral, Aging and Disability Resource Centers (ADRC), AAAs, Adult Day Health, PACE, Case Management and more. RTZ Associates offers easy-to-use, browser-based tools that meet your community’s needs, along with a customer-driven process that begins with your first call. Stop by our booth and learn about the RTZ Advantage or to pick up one of our fun pens.

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Lisa Hrivnak
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**Time for a more modern I&R software system?**

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<td><a href="mailto:tyre.wilde@noaa.gov">tyre.wilde@noaa.gov</a></td>
</tr>
<tr>
<td>Vicki Schmall</td>
<td>Aging Concerns</td>
<td>West Linn, Oregon</td>
<td><a href="mailto:vschmall@comcast.net">vschmall@comcast.net</a></td>
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<tr>
<td>Viviana Criado</td>
<td>California Elder Mental Health and Aging Coalition</td>
<td>California</td>
<td><a href="mailto:viviana.criado@gmail.com">viviana.criado@gmail.com</a></td>
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<tr>
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<td>Seattle, Washington</td>
<td><a href="mailto:ysimpson@crisisclinic.org">ysimpson@crisisclinic.org</a></td>
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### 2013 Exhibitors (By Booth Name)

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What makes Portland so special? Some will tell you it’s all about the trees, fresh air and proximity to the mountains, rivers and ocean. Others think the indie music and arts scenes define our particular brand of cool. Many are partial to the amazing food and drink you’ll find in Portland. And there is no sales tax!

How can one place have so much going on? Come find out for yourself.

**GETTING AROUND**

The four lines of Portland’s MAX light rail system (www.trimet.org/max) connect Portland International Airport (PDX), downtown hotels and the Oregon Convention Center, as well as popular destinations like the Rose Garden arena, Lloyd Center shopping mall and Washington Park. The trip from PDX to downtown takes about 40 minutes and costs $2.50.

You can easily travel between the cultural attractions of downtown, the galleries and restaurants of the Pearl District, and the boutiques of Northwest Portland all on the sleek and modern Portland streetcar (www.portlandstreetcar.org). The streetcar serves the east side, with access to the Rose Garden arena, the Oregon Museum of Science and Industry (OMSI) and the new Oregon Rail Heritage Center, as well as many acclaimed boutiques and restaurants. Two-hour tickets can be purchased for $1.00 onboard any streetcar; MAX tickets are also good for the streetcar and buses.

If you prefer to explore on foot, you’ll find downtown Portland’s half-size city blocks and plentiful public spaces ideal. Find walking maps and tour providers at the Travel Portland Visitor Information Center in downtown’s Pioneer Courthouse Square.

**Discounted Auto Rental Rates:**
AIRS has negotiated discounted auto rental rates with Avis Auto Rental for our attendees. Rates are available from May 26-June 13. To make your auto rental arrangements, please call Avis at 800.331.1600 or online at www.avis.com and refer to AWD number “J906508” to receive the special AIRS discounted rates.

**ATTRACTIONS**

Portland has a wide range of fun and inviting destinations. Here are a few of favorites:

- International Rose Test Garden - www.portlandparks.org
- Lan Su Chinese garden - www.lansugarden.org
- Oregon Zoo - www.oregonzoo.org
- Oregon Museum of Science and Industry - www.omsi.edu
- Pittock Mansion - www.pittockmansion.org
- Portland Art Museum - www.portlandartmuseum.org
- Portland Japanese Garden - www.japanesegarden.com
- Portland Saturday Market - www.portlandsaturdaymarket.com

**DINING**

Portland’s lush surroundings and its residents’ dedication to sustainability make for more than a lovely environment, they add up to a creative culinary scene featuring the freshest local flavors. TIME.com called Portland “America’s new food Eden, a confluence of every fertile trend in contemporary gastronomy.” Budget Travel named Portland the source of the world’s best street food, noting that “with more than 400 carts selling everything from Korean tacos to Carolina-style barbecue, Portland is a microcosm of mobile meals.”

**Acclaimed restaurants:**
- Higgins Restaurant & Bar - www.higginsportland.com
- Paley’s Place - www.paleyplace.net
- Le Pigeon - www.lepigeon.com
- Pok Pok - www.pokpokpdx.com

If you’re hungry for dessert, or just want a taste of “Keep Portland Weird” spirit, head for Voodoo Doughnut (www.voodoodoughnut.com). Open 24 hours, this quirky shop’s unconventional lineup includes a maple bar with strips of real bacon on top.

**BARS & BREWPUBS**

Must-visits among the dozens of breweries in “Beervana” include:
- Bridgeport Brewing Company - www.bridgeportbrew.com
- Widmer Brothers Brewing - www.widmer.com
- Deschutes Brewery & Public House - www.deschutesbrewery.com

**For wine lovers:**
- Noble Rot - www.noblerotpdx.com
- Pearl District’s Teardrop Lounge - www.teardroplounge.com
- Clyde Common - www.clydecommon.com

**ARTS & MUSIC**

Art galleries of the Pearl District, Old Town and downtown, become hot destinations on the first Thursday (www.firstthursday.org) evening of each month.

**Theater companies:**
- Oregon Ballet - www.obt.org
- Artists Repertory Theatre - www.artistsrep.org
- Portland Center Stage - www.pcs.org
- The Portland Opera - www.portlandopera.org
- Oregon Symphony - www.orsymphony.org

**Music Venues:**
- Doug Fir Lounge - www.dougfirlounge.com **indie rock**
- Jimmy Mak’s - www.jimmymaks.com **velvety jazz**

**SHOPPING (TAX-FREE)**

In Portland, you’ll find everything you expect from world-class shopping, except the sales tax.

In Downtown - www.downtownportland.org
In the Pearl District - www.explorethepearl.com
In the Northwest/Nob Hill area - www.nobhillbiz.com
Lloyd Center - www.lloydcentermall.com
Woodburn Company Stores - www.woodburncompanystores.com

So as you can see, there is so much to visit and do in Portland, please join us ... and did we mention, **no sales tax!**

**The City of Portland Welcomes You**...
Ever wonder how your contact center compares to other 2-1-1’s?

With the Contact Center Benchmark Assessment, you can stop speculating and get the facts.

- In-depth results – get a customized report, with analyst recommendations for improving performance
- Quick online assessment – our web-based survey takes just 5 minutes
- Designed for you – assessment is tailored to your role, addressing operational, managerial or technical issues

Visit inContact at

BOOTH 13

While you’re there, register to win an iPad Mini
A big AIRS thank you to all our volunteers who helped make this conference a success!

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The Alliance of Information and Referral Systems
The Alliance of Information & Referral Systems (AIRS) is the international professional association of information & referral providers throughout the United States, Canada and around the world. Incorporated in 1973, the mission of AIRS is to provide leadership and support to its members and affiliates to advance the capacity of a Standards-driven Information and Referral industry that brings people and services together.

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June 1-4, 2014 • Sheraton Atlanta, Atlanta, Georgia