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Welcome to the AIRS Conference

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Dear AIRS Members and Guests,

On behalf of the AIRS Board of Directors, we welcome you to Atlanta, Georgia and the 36th Annual I&R Training and Education Conference. 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 welcome session on Sunday afternoon and the opening networking reception in the exhibit hall. Make plans to attend the Tuesday luncheon sponsored by our partners in “aging/disabilities” and the Annual Meeting on Wednesday. We hope you will join us Monday evening for dinner at the Georgia Aquarium and on Tuesday for the popular Friends of AIRS Dessert Reception and Silent Auction.

This is your conference to network, share best practices, identify and overcome challenges and to further enhance your I&R expertise and perception. 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 encouraged 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 are here and we are ready to help. It is time to branch out in I&R. A great chance to learn new skills, develop new relationships and be energized for the important work you do. Enjoy the conference!

Joan Phelps
United Way of Central Virginia, President of AIRS
Dear Colleagues,

We invite you to join us for the 36th 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), the National Association of Area Agencies on Aging (n4a), and the National Center on Independent Living (NCIL). The Symposium 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 workshop sessions will feature national, state and local professionals presenting on hot topics such as national policy, partnership within the aging and disability networks, LGBT Aging, participant-direction, the Affordable Care Act, veterans’ programs and services, and cultural competency. Symposium coordinators have worked closely with other track managers again 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 National Aging and Disability Pre-Conference Summit on Sunday, June 1, for networking, discussion and technical assistance on current trends, new initiatives and innovations in I&R/A service delivery. This year, we will be joined by NCIL for the first time, to help answer your questions, and complete the policy and advocacy perspective of the aging and disability network. On Tuesday, June 3, you will not want to miss the luncheon featuring Gerianne Prom, Vice President of Long-Term Care, at the Milwaukee Center for Independence, Milwaukee, WI. Ms. Prom will highlight the themes of independent choice, person-first perspective, and participant-direction present throughout the Aging and Disability Symposium.

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

Martha A. Roherty, Executive Director
National Association of States United for Aging and Disabilities
Dear Colleagues,

For the second time at the AIRS Conference, 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.

These workshops will provide you with a wide spectrum of resources and information to assist you as you help Active Duty service members, veterans, and their families re-integrate into civilian life. The stress of war, multiple deployments, and frequent moves can affect the wellness of military families. Our workshops will provide you with insight and resources so you know how best to help them.

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.

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
Conference Highlights

Pre-Conference Training Intensives:
Sunday, June 1
9:00 am – 4:15 pm
These three pre-conference training opportunities offer participants the opportunity to explore topics in greater detail. These all-day sessions run concurrently. Pre-registration is required.

The ABCs of I&R
Georgia 7
Instructors: Faed Hendry, Findhelp Information Services, Toronto, Ontario; Shye Louis, 211 LIFELINE, 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.

Crisis Intervention: A Branch of the I&R Tree
Georgia 8
Instructor: John Plonski, Training Consultant, Prevention Suicide Coalition, Hicksville, New York
I&R and Crisis Intervention are not mutually exclusive. This workshop will allow I&R supervisors, trainers and frontline workers to examine the roots of crisis and understand how the five step I&R process and active listening skills described in the ABCs of I&R provide us with the tools for effective crisis intervention. Using these basics and familiar skills, attendees will be able to de-escalate consumers in crisis and identify their core issues allowing for appropriate referral and empowerment.

Employee Motivation: A Supervisor’s Toolkit
Georgia 9
Instructor: Erin Goff, United Way of Greater Toledo, Toledo, Ohio; Martha Love, United Way of Greater Toledo, Toledo, Ohio
Whether you are a new supervisor or have a few years of management under your belt, it seems to be true that 10% of employees take up 90% of your time. Gain a better understanding of employee motivation, and be able to use that understanding to increase employee performance, and decrease the amount of time you spend managing your “difficult” staff. Participants should come prepared with questions and examples for discussion.

National Aging and Disability I&R/A Pre-Conference Summit
Sunday, June 1, 9 am-5 pm
Georgia 11
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 Support Center, the U.S. Administration for Community Living (ACL), and the National Association of Area Agencies on Aging (n4a), and the National Council on Independent Living (NCIL), for a lively and thought-provoking day of interactive events and discussion prior to the start of the AIRS Conference. This year, we will be joined by NCIL for the first time, to help answer your disability-related questions, enhance state and local partnerships, and complete the policy and advocacy perspective of the aging and disability network.

The Summit includes:
1. A networking continental breakfast during which participants can catch up with their national aging and disability I&R/A counterparts and mingle with staff from ACL, NASUAD, n4a and NCIL.
2. A brief overview of updates from the Aging and Disability Summit Partners (NASUAD, ACL, n4a and NCIL)
3. 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.
4. A preview of the National I&R Support Center’s disability training created in collaboration with NCIL and a disability training workgroup, at the suggestion of 2013 Aging and Disability Summit participants.

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, initiatives, challenges and solutions. Throughout the Summit, participants will have opportunities to network with aging and disability I&R/A peers from around the country, participate in group discussions, learn about innovative strategies for service delivery and partnership, 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 are available. Please register for this event on the AIRS conference registration form, and contact Support Center Director, Sara Tribe at 202.898.2578 x 305 or stribe@nasuad.org, with questions and/or to suggest topics that you would like to discuss at the Summit.

Serving the Military Workshops
The Serving the Military Track consists of eight military workshops. The sessions on this track have been selected for their value, personally and professionally in helping meet the needs of military personnel and their families.

AIRS Certification Exams
Sunday, June 1, 1:30 pm,
Atlanta Regional Commission - 40 Courtland Street NE
Tuesday, June 3, 2:30 pm,
Atlanta Regional Commission - 40 Courtland Street NE
AIRS offers the only 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 1 at 1:30 pm and Tuesday, June 3 at 2:30 pm. You must be pre-registered and approved through the AIRS National Office to be eligible to take the exams.

Persons taking the exam will be provided with instructions on reaching the (nearby) location.
Newcomers and Military Orientation
Sunday, June 1, 4:30 pm – 5:30 pm
Atlanta 3
All new members, first time attendees and military personnel are invited to join the AIRS Board of Directors, staff and local hosts to ask questions about AIRS, network, and learn about the conference and the vibrant city of Atlanta.

User Group Meetings
Sunday, June 1, 2:00 pm – 3:45 pm
iCarol - Augusta lobby level
Sunday, June 1, 2:00 pm – 3:45 pm
RTM Designs - Macon
Software users of the above systems are invited to attend a user group meeting to learn about the latest updates and have your questions answered.

Welcome Reception in the Exhibit Hall
Sunday, June 1, 5:30 pm - 6:30 pm
Georgia 2-6
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 get to network and tour the exhibit hall in a friendly, relaxed atmosphere.

Dinner at the Georgia Aquarium
Monday, June 2, 6:30 pm - 8:30 pm
Join us for a delicious dinner amid the beauty of the Georgia Aquarium. Enjoy a spectacular view and buffet dinner inside a huge aquarium. The aquarium is in a short walking distance and transportation will be available in the lobby for those requiring it. There will be a cash bar, with an average alcoholic drink cost of $7.00. Dinner is included in your full registration fee. Admission to tour the aquarium is not included.

Dessert Networking Reception and Friends of AIRS Auction
Tuesday, June 3, 7:30 pm – 9:00 pm
Athens
Join us for “Peachy-Keen” Friends of AIRS Silent Auction and Dance party, an AIRS conference tradition. Have a peach of a good time and raise money for AIRS conference scholarships. Enjoy treats, cash bar and music while you bid on wonderful, unique auction items.

AIRS Annual Membership Meeting & Luncheon
Wednesday, June 4, 12:30 pm – 2:00 pm
Capitol Ballroom South
Everyone is encouraged to join us at the annual membership meeting and luncheon.

Cyber Café
Open daily in the exhibit hall during exhibit hall hours. Keep in touch with your office, family, and co-workers online in the AIRS Cyber Café. Computers provided for your convenience.
Welcome to Georgia
June 2
8:00 am – 9:45 am
Capitol Ballroom South
Douglas R. Hooker
Atlanta Regional Commission Director

Douglas R. Hooker is the executive director of the Atlanta Regional Commission (ARC). As head of the official planning organization for the 10-county, 70-city Atlanta region, he oversees regional planning programs in the areas of transportation, community development, land use, water and natural resources, aging services, workforce development and more.

Mr. Hooker is deeply involved in the community. He is a graduate of Leadership Atlanta, Leadership Georgia, the Regional Leadership Institute, and the Institute for Georgia Environmental Leadership. Doug was a co-founder, board member and former chairman of the Civic League for Regional Atlanta. He serves on numerous other boards, including the Council for Quality Growth, CHRIIS Kids, and The Atlanta Opera. He is a former board member of the Metro Atlanta Chamber of Commerce, the Emory University Board of Visitors, the Regional Business Coalition, Georgians for Passenger Rail, Georgia Conservancy, Park Pride and the Institute for Georgia Environmental Leadership, among others. He was also appointed by Gov. Roy Barnes to serve on the inaugural board of the Metropolitan North Georgia Water Planning District.

Opening Breakfast Speaker
June 2
8:00 am – 9:45 am
Capitol Ballroom South
Dr. Arlene Lester
DDS, Captain, United States Public Health Service

Dr. Lester serves as the Regional Minority Health Consultant, Office of the Secretary, U.S. Department of Health and Human Services (HHS-Region IV). In this capacity, she facilitates policies and activities targeted at the achievement of health equity and elimination of health disparities in the south eastern United States.

Before taking the helm as HHS Region IV Minority Health Consultant, she served as a Senior Program Management Consultant with the Division of Diabetes Translation, Centers for Disease Control and Prevention (CDC). During her tenure at CDC, the US Public Health Service awarded her the Commendation Medal for establishment of effective partnerships. Dr. Lester is a graduate of the School of Dentistry at the historic Meharry Medical College and the Rollins School of Public Health at Emory University. With over twenty years of service in public health, she resides in Atlanta, Georgia with her son Jack Allan.

Aging/Disabilities Luncheon — Keynote Speaker
Tuesday, June 3
12:15 pm – 2:00 pm
Capitol Ballroom South
Gerianne Prom
Vice President of Long-Term Care
Milwaukee Center for Independence and iLIFE, LLC

Gerianne Prom has provided strategic leadership as a nonprofit human services and healthcare executive for nearly three decades. She has dedicated her career to advancing person-centered principles and translating them into innovative, effective programming for people who are living with a disability. As a result, people with disabilities have experienced enhanced outcomes and the programs she leads have seen unprecedented growth.

As Vice President of Long-Term Care, Gerianne provides executive leadership for Centers for Independence affiliate agencies Milwaukee Center for Independence and iLIFE, LLC. Both organizations are aligned to principles fostering self-determination and helping clients reach their highest levels of achievement. iLIFE, LLC provides financial management services for people with disabilities. iLIFE in Wisconsin has grown from a few clients served in 1988 to more than 13,000 participants today, as people with disabilities gain more control over their own service decisions as well as financial options. iLIFE functions as a separate organization from the Milwaukee Center for Independence, consistent with industry best practices.

Gerianne is passionate about deeply understanding the needs of persons served. Armed with that understanding, she aligns professionals to actively transform service delivery to address specific community needs. Her work with
families, students and schools led to the development of LIFE Academy, the first youth-focused day habilitation program in Wisconsin, considered a model program for young people who are transitioning from school to the workplace and life in the community. She also engaged people who had sustained brain injuries and their families, which led to community collaborations and unique service and support options.

Gerianne earned her Bachelors of Science degree at University of Wisconsin-Madison and attended graduate school at the University of Dayton, in Dayton, Ohio. She and her husband live in New Berlin, Wisconsin and have children attending the University of Minnesota-Twin Cities, American University in Washington, DC and an adult son and his wife living in Irvine, California. She is active in her community and serves on the Board of Managers for the YMCA.

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

Closing Luncheon
Keynote Speaker
Wednesday, June 4
12:30 pm - 2:00 pm
Capitol Ballroom South
Milton J. Little, Jr.,
President United Way of Greater Atlanta

Mr. Little became the first African-American president of United Way of Greater Atlanta, the second-largest in the national system, in July 2007.

Mr. Little joins a strong legacy of fundraising and collaborative leaders who bring together supportive partners in the for-profit, nonprofit, philanthropic and government sectors to identify challenges facing individuals and families and offer solutions. He has helped raise more than half a billion dollars for local community needs and priorities.

In 2010, under Mr. Little’s leadership, nearly 17,000 Georgia families received a total of $20.5 million in emergency financial assistance through the Georgia Fresh Start initiative, led by United Way of Greater Atlanta and the Georgia Department of Human Services. The funds were provided by the federal American Recovery and Reinvestment Act to provide relief on past due mortgage, rent and/or utilities expenses during the worst economic downturn since the Great Depression.

Mr. Little has been in the forefront of shaping the role of United Way in responding to economic and natural disasters, from bringing together community leaders when a tornado struck downtown Atlanta to overseeing United Way’s efforts to stabilize North Georgia victims of flooding in 2009.

Before joining United Way, Mr. Little served as chief operating officer and interim president and CEO of the National Urban League. Prior to joining the League, he had a career in corporate philanthropy at AT&T and Lucent Technologies and served as vice president for Field Operations at MDRC, a non-partisan education and social policy research organization.

Mr. Little serves as chair of the board of directors for the Center for Assessment and Policy Development and as vice chair of the board of directors for Ways to Work. He is a member of the Atlanta Mayoral Board of Service, the Commerce Club Operating Board and the Charity Defense Council Board. A member of 100 Black Men of Atlanta, Leadership Atlanta Class of 2010 and the Rotary Club of Atlanta, he also serves on several advisory boards and councils.
Conference and Workshop Evaluation Forms
Your feedback is important and needed in helping us plan future conferences. Please take a few extra minutes to complete evaluation forms for each workshop you attend and the overall conference evaluation form.

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

To be awarded CEUs, you will need to do the following:
• Pay a fee of $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 utilize their image, likeness, voice recordings and videos in an effort to promote AIRS events. Attendees, exhibitors and speakers waive any right to inspect or approve the finished product(s). Any photos, likeness, voice recording or videos 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 2014 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. For additional details on United Way Worldwide’s travel reimbursement policies visit https://online.unitedway.org/flexcredits or contact Marcia Struniak, 703.836.7112 x 237 or marcia.struniak@uww.unitedway.org

“Session Full” Notices
Due to the nature of our workshops and to both minimize disruptions and follow fire regulations, 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 1
- **Registration** – Georgia Foyer  
  7:00 am – 6:00 pm
- **National Aging & Disability I&R/Assistance Summit** – Georgia 11  
  9:00 am – 3:00 pm
- **The ABC’s of I&R Intensive** – Georgia 7  
  9:00 am – 4:15 pm
- **Crisis Intervention-A Branch of the I&R Tree Intensive** – Georgia 8  
  9:00 am – 4:15 pm
- **Employee Motivation: A Supervisor’s Toolkit Intensive** – Georgia 9  
  9:00 am – 4:15 pm
- **211 State Directors Session** – Atlanta 2 (Only 211 Directors and designates)  
  1:00 pm – 5:00 pm
- **Certification Exams** – Atlanta Regional Commission  
  1:30 pm – 3:30 pm
- **Newcomers and Military Orientation & Welcome** – Atlanta 3  
  4:30 pm – 5:30 pm
- **Opening Reception in Exhibit Hall** – Georgia 2-6  
  5:30 pm – 6:30 pm

### Monday, June 2
- **Registration** – Georgia Foyer  
  7:00 am – 5:00 pm
- **Cyber Café** – Georgia 2-6  
  8:00 am – 4:00 pm
- **Opening Breakfast** – Capitol Ballroom South  
  8:00 am – 9:45 am
- **Exhibits Open** – Georgia 2-6  
  (Note: The Exhibit Hall will not be open on Wednesday)  
  8:00 am – 4:00 pm
- **Workshops**  
  10:00 am – 11:15 am
  1:00 pm – 2:15 pm
  2:30 pm – 3:45 pm
  3:00 pm – 4:15 pm
- **Dinner at the Georgia Aquarium**  
  6:30 pm – 8:30 pm

### Tuesday, June 3
- **Registration** – Georgia Foyer  
  8:00 am – 6:00 pm
- **Cyber Café** – Georgia 2-6  
  8:00 am – 5:00 pm
- **Breakfast on your own**
- **Workshops**  
  8:30 am – 10:00 am
  10:30 am – 12:15 pm
  2:15 pm – 3:30 pm
  3:00 pm – 4:15 pm
- **NASUAD Sponsored Luncheon (Open to all)** – Capitol Ballroom South  
  12:15 pm – 2:00 pm
- **Certification Exams - Atlanta Regional Commission**  
  2:30 pm – 4:30 pm
- **“Peachy Keen” Dessert Networking Reception and Friends of AIRS Auction** – Athens  
  7:30 pm – 9:00 pm

### Wednesday, June 4
- **Registration** – Georgia Foyer  
  8:00 am – 2:00 pm
- **Workshops**  
  9:00 am – 10:30 am
- **Workshops**  
  10:45 am – 12:15 pm
- **Annual Meeting & Membership Luncheon (Open to all)** – Capitol Ballroom South  
  12:30 pm – 2:00 pm
- **Workshops**  
  2:15 pm – 3:30 pm
- **Conference Adjourns**  
  3:30 pm
Workshops by Date & Time

**Monday, June 2**
10:00am - 11:30am
A-1: National Policy Updates: Aging and Disability I&R/A – Georgia 9
A-2: Increasing Access to Services for LGBT Older Adults – Georgia 7
C-1: Resources to Support Those Who Defend The Nation – Georgia 8
D-1: Emergency Management: Through the Long Lens of AIRS Standards – Atlanta 1
E-1: Caller Assessment the AIRS Standards Way – Atlanta 2
E-2: Suicide Risk Assessment Training – Atlanta 3
F-1: Managing, Surviving and Thriving on Change Within the I&R Sector – Atlanta 4
G-1: Resource Database 101 – Atlanta 5
H-1: Service Delivery from the Community Up: An Ontario Approach to Information Management – Augusta
J-1: Thinking Outside the Box: Innovative Collaborations – Macon
J-2: You Say You Want a “re:Volution”? – Georgia 11

**Monday, June 2**
1:00pm – 2:15pm
A-3: Conversations that Matter: Working Across Disciplines to Support Aging in Place – Georgia 9
A-4: Health Insurance Jeopardy: Asking the Right Questions when Assisting Consumers with Disabilities with Healthcare Enrollment – Georgia 8
B-1: Development of a Data Dashboard for 211s and their Communities – Atlanta 1
C-2: The Intersection of Mental Health Services and Supports for Veterans, Older Adults and Their Caregivers – Atlanta 2
D-2: Understanding Winter Weather and its Impacts: Lessons Learned in Atlanta 2014 – Atlanta 3
E-3: Tapping into New Community Resources: Medical Surplus Recovery Organizations – Atlanta 4
F-2: For-Profit Thinking in a Non-Profit World: Ideas for Utilizing Corporate Call Center Practices to Improve Your Non-Profit Call Center – Georgia 11
G-2: Taming the Beast: Indexing with the AIRS/211 LA County Taxonomy – (Part One) Georgia 7
H-1: Service Delivery from the Community Up: An Ontario Approach to Information Management – Augusta
J-1: Thinking Outside the Box: Innovative Collaborations – Macon
J-2: You Say You Want a “re:Volution”? – Georgia 11

**Monday, June 2**
3:00pm – 4:30 pm
A-6: A Humorous Introduction to Disability Culture – Georgia 8
B-2: 211: Evolving from a Call Center to a Contact Center – Georgia 9
C-3: Enabling Successful Reintegration: From Military Service to Civilian Life – Atlanta 1
D-3: Using Open Source Technology to Coordinate Disaster Recovery – Atlanta 2
E-4: Follow-ups: Completing the Circle of I&R – Atlanta 3
F-3: You Have Data, Now Use It! – Georgia 11
F-4: Front-line to Management: What Do I Do Now? – Atlanta 4
G-3: Taming the Beast: Indexing with the AIRS/211 LA County Taxonomy – (Part Two) Georgia 7
J-5: Integrating I&R Resources with Existing Public and Private Resources to Create an Integrated Referral and Coordinated Service Delivery Solution – Georgia 13

**Tuesday, June 3**
8:30am – 10:00am
A-7: The Affordable Care Act: Marketplace Plans and Medicare – Georgia 11
A-8: Newly Arrived Refugees: Cultural and Linguistically Competent Services – Georgia 8
B-3: 211 Assembly – (Part One) Georgia 9
C-4: The 4 R’s: Today’s Times Means Recognizing, Responding and Providing Resources to Create Results in a Service Member’s Financial Readiness in their Career and Life – Georgia 7
D-4: Emergency Planning and Response for the Whole Community: Information, Resources and Tools – Atlanta 1
E-5: Calibration Corner: Best Practices in Ensuring Consistent Call Quality Measures – Atlanta 2
F-5: Big-Small Partnerships that Work: Benefits, Challenges and Integration Issues when 211s & Specialized I&Rs Come Together – Atlanta 3
G-4: Resource Database Assembly: The Next Generation – (Part One) Atlanta 4
J-6: Have a Coke and a Smile: Distribution Channel Management and Marketing for I&R – Georgia 13
J-7: HIPAA 102, What You Don’t Know About HIPAA Privacy and Security Can Hurt You – Atlanta 5
Tuesday, June 3
10:30am – 12:00pm
A-9: No Wrong Door System for All Populations and All Players – Georgia 11
A-10: Steering Towards the Future: The Importance of Rural Transportation Programs and Initiatives – Georgia 8
B-4: 211 Assembly – (Part Two) Georgia 9
C-5: Army OneSource: Best Practices for Integrating Military and Civilian Communities – Georgia 7
D-5: A Disaster by Any Other Name: Exploring I&R's Role Among Varying Levels of Disasters – Atlanta 1
E-6: From Burnout to Self-Care: Inspiring Staff Wellness – Atlanta 2
F-6: Growing Deeper Roots: Strengthening I&R/A Partnerships through a Call Monitoring Project – Atlanta 3
G-5: Resource Database Assembly: The Next Generation – (Part Two) Atlanta 4
H-4: Innovations in Public Websites: Two Case Studies – Atlanta 5
J-8: Outreach Methods for Non-Traditional Communities (African American, Asian American, Hispanic/Latino American, Native American, Pacific Islander, LGBT, Refugee) – Georgia 13

Tuesday, June 3
2:15pm – 3:30pm
A-11: Social Security Disability Benefits and Online Resources for Veterans and Other People with Disabilities – Georgia 7
A-12: Alleviating Elder Economic Insecurity: Resources for Communities – Georgia 8
B-5: Local Community/Local Sustainability of 211: Choosing a Business Model that Works for Your Community – Atlanta 1
B-6: 211 Partnerships and Collaborations – Georgia 9
C-6: Building Community Partnerships Using a Community Needs Assessment to Serve Veterans with Disabilities – Atlanta 2
D-6: CDC, Flu on Call. 211 as the ‘Entry’ During Times of a Pandemic – Georgia 11
F-7: Feedback: It Ain’t Just Noise – Georgia 13
G-6: Don’t Let Your Agency Get Left in the Dust: Updating Database Info is a Must – Atlanta 3
H-5: Database Sharing: The Challenges and Opportunities – Atlanta 4
J-9: One-Call, One-Click Software: Providing I&R Clients with Improved Transportation and Trip Planning Information – Atlanta 5

Wednesday, June 4
9:00 am – 10:30am
A-13: Rights in Passage: Transition Age Youth Achieving Independence – Georgia 7
A-14: Getting from A to B: Finding Community Transportation Resources for Customers – Georgia 8
B-7: Positioning Your 211 To Participate in Health Disparities Research: Opportunities and Challenges – Georgia 11
C-7: Wounded Warrior Project Resource Center: Connecting Warriors with Programs and Services – Atlanta 1
D-7: When a Disaster Happens, Are We Prepared? – Atlanta 2
E-7: Crisis Call: Conquering the Panic Response – Atlanta 3
F-8: Build a Better Mousetrap: Quality Assurance and Call Specialist Performance Evaluation – Atlanta 4
G-7: Tools and Tricks for Improving Any Resource Database or How We Turned Our Database Around While Tripling the Service Area – Atlanta 5
H-6: Introduction to Open Referral – Georgia 9
J-10: Organizational Capacity Building: The Four Core Capacity Model – Georgia 13

Wednesday, June 4
10:45am – 12:15pm
A-15: Beyond the Silos: Collaboration Between Behavioral Health and Aging – Georgia 7
A-16: Highlighting Aging and Disability Partnerships through I&R/A Resources – Georgia 8
B-8: Building a Quality Assurance Program for 211 Centers Using ‘Voice of the Customer’ Research – Georgia 9
C-8: I&R 101 for Military Affairs: Building a Strong I&R Program for Military Affairs to Leverage I&R Data with Community Partnerships to Address Critical Veteran Service Gaps – Atlanta 1
E-8: From the Training Room to the Call Center: How to be a Success! – Atlanta 2
F-9: The Power of 10: 10 Promising Techniques to Promote Excellent Customer Service in the Call Center – Georgia 11
G-8: So You’ve Got a Database, Now What? – Atlanta 3
H-7: Innovations in Social Media: What We Can Learn Across I&R Disciplines – Atlanta 4
J-11: Cultivation Through Stewardship: Learn How to Maintain and Grow Your Donor Database – Atlanta 5

Wednesday, June 4
2:15pm – 3:30pm
B-9: 211 US Steering Committee Open House – Atlanta 1
F-10: All Things I&R Management Open House – Atlanta 2
G-9: Resource Database Open House – Atlanta 3
H-8: Technology Open House – Atlanta 4
Workshops by Track and Description

(A) AGING AND DISABILITIES TRACK

Brought to you by NASUAD

The sessions on this track are geared towards issues distinct to Aging and Disabilities. However, there may be sessions of interest to people working in other areas of I&R/A. Remember, anyone can attend any session and that everything in I&R and I&A is connected.

Monday, June 2
10:00am – 11:30am
Georgia 9

A-1: "National Policy Updates: Aging and Disability I&R/A"
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); the National Association of Area Agencies on Aging (n4a), and the National Council on Independent Living (NCIL). A broad range of topics will give supervisors and front line staff of state and local agencies for aging and disability a comprehensive review of current trends in aging and disability policy, innovative models for the delivery of I&R/A, and the latest updates on how the Affordable Care Act impacts aging and disability I&R/A.


Monday, June 2
10:00am - 11:30am
Georgia 7

A-2: "Increasing Access to Services for LGBT Older Adults"
The state of Georgia convened a statewide workgroup to explore increasing access to services for LGBT older adults and to develop processes to identify and designate LGBT inclusive service providers within its I&R network. This workshop reviews that workgroup's results and considers application possibilities in other states and regions.

Linda Ellis, The Health Initiative, Atlanta, Georgia; Doug Carl, Georgia Department of Human Services, Department of Aging Services, Atlanta, Georgia; Shelly Wender, Atlanta Regional Commission, Atlanta, Georgia

Monday, June 2
1:00pm – 2:15pm
Georgia 9

A-3: "Conversations that Matter: Working Across Disciplines to Support Aging in Place"
This presentation is aimed at ADRC staff, options counselors, case managers and others within the ADRC network and will delve into discussions of the work of ADRCs across populations, in a person-centered manner, and empowerment of individuals and families promoting true community inclusion through ADRCs network and plethora of programs. Hear discussions from the founders of person-centered work and how this work can shape and drive the work of the ADRCs.

Amy Riedesel, Georgia Department of Human Services, Division of Aging Services, Atlanta, Georgia

Monday, June 2
1:00pm – 2:15pm
Georgia 8

A-4: "Health Insurance Jeopardy: Asking the Right Questions when Assisting Consumers with Disabilities with Healthcare Enrollment"
People with disabilities who lack health insurance face many options now that the ACA has gone into effect. I&R specialists assisting uninsured individuals need to make sure they are asking the right questions when providing this assistance. The National Disability Navigator Resource Collaborative aims to provide the resources needed to assist consumers with disabilities as they enroll.

Karl D. Cooper, American Association on Health and Disability, Rockville, Maryland

Monday, June 2
3:00pm – 4:15pm
Atlanta 5

A-5: "The Consumer Financial Protection Bureau: Protecting and Empowering Older Consumers"
The Consumer Financial Protection Bureau works to make markets for consumer financial products and services both transparent and fair. We respond and analyze complaints related to financial products from consumers. Whether you are frontline staff or a manager, join us to learn more about our consumer complaints system and the work of our Office for Older Americans.

Hector Ortiz, Consumer Financial Protection Bureau, Office for Older Americans, Washington, DC; Darian Dorsey, Consumer Financial Protection Bureau, Office of Consumer Response, Washington, DC

Monday, June 2
3:00pm – 4:15pm
Georgia 8

A-6: "A Humorous Introduction to Disability Culture"
This session will be of value to anyone who needs an introduction to disability culture, disability humor, little known facts about how people with disability were embraced in some cultures and finally the expected outcomes for quality I&R services in Centers for Independent Living.

Pat Puckett, Statewide Independent Living Council, Decatur, Georgia; Roger Howard, LINC Center for Independent Living, Boise, Idaho

Tuesday, June 3
8:30am – 10:00am
Georgia 11

A-7: "The Affordable Care Act: Marketplace Plans and Medicare"
In January 2014, many uninsured individuals began to receive their health insurance through Marketplace plans authorized under the Affordable Care Act. This session will provide information on the first five months of the new health insurance Marketplace plans and some of the challenges faced. There will be an emphasis on the relationship between the health insurance Marketplace plans and Medicare. This session will provide information on transitions from Marketplace plans, including Medicaid expansion, to Medicare and Medicare related programs (MSP and LIS).

Leslie Fried, National Council on Aging, Washington, DC
A-1: “Social Security Disability Benefits and Online Resources for Veterans and Other People with Disabilities”
This session is designed to help I&R specialists obtain viable information and tools to assist people with disabilities, including veterans, in applying for Social Security disability benefits. The presenter will discuss Social Security Disability (SSDI) and Supplemental Security Income (SSI) eligibility requirements, the online application process and best practices. Special focus will also be given to a variety of online resources that veterans and caregivers can use during and after the application process.
Alicia Lipscomb, Georgia Area Director’s Office, Social Security Administration, Atlanta, Georgia

Tuesday, June 3
2:15pm - 3:30pm
Georgia 8

A-2: “Getting from A to B: Finding Community Transportation Resources for Customers”
Are you challenged to find resources when a caller asks “I need to find a ride?” If so, join a discussion on matching transportation resources with customer needs. This session will cover the family of transportation services including ADA paratransit, dial-a-ride, and private, human service, veteran, and medical providers, as well as

Tuesday, June 3
2:15pm – 3:30pm
Georgia 7

A-11: “Social Security Disability Benefits and Online Resources for Veterans and Other People with Disabilities”
This session is designed to help I&R specialists obtain viable information and tools to assist people with disabilities, including veterans, in applying for Social Security disability benefits. The presenter will discuss Social Security Disability (SSDI) and Supplemental Security Income (SSI) eligibility requirements, the online application process and best practices. Special focus will also be given to a variety of online resources that veterans and caregivers can use during and after the application process.
Alicia Lipscomb, Georgia Area Director’s Office, Social Security Administration, Atlanta, Georgia

Tuesday, June 3
2:15pm - 3:30pm
Georgia 8

A-12: “Alleviating Elder Economic Insecurity: Resources for Communities”
Nearly 23 million older Americans are economically insecure and lack the resources to make ends meet. Session participants will learn about a new holistic approach to economic security that involves a new way of thinking about service delivery at the community level, and EconomicCheckUp, a new online consumer tool that can empower low-income seniors to assess their needs and seek assistance.
Maggie Flowers, National Council on Aging, Washington, DC

Wednesday, June 4
9:00am – 10:30am
Georgia 7

A-13: “Rights in Passage: Transition Age Youth Achieving Independence”
As young people with intellectual and developmental disabilities make the passage from adolescence to adulthood, they are faced with many unique challenges. Large numbers of transition age youth are entering into Participant-Directed programs. While the ability to locate, hire, train and supervise homecare workers can be liberating, personal choice also requires responsibility and accountability, which can be barriers to success. Caregivers may also complicate the process when they don’t acknowledge what young people want for themselves. This session reviews consumer rights, person-centered planning and self-determination, models of participant-directed services, employer authority, boundaries and ethics concerns, solution-oriented discussion of best practices, and an examination of successes through film vignettes.
Gerianne Prom, Centers for Independence, iLIFE LLC, Milwaukee, Wisconsin; Danielle Skenadore, Centers for Independence, iLIFE LLC, Milwaukee, Wisconsin

Wednesday, June 4
9:00am – 10:30am
Georgia 8

A-14: “Getting from A to B: Finding Community Transportation Resources for Customers”
Are you challenged to find resources when a caller asks “I need to find a ride?” If so, join a discussion on matching transportation resources with customer needs. This session will cover the family of transportation services including ADA paratransit, dial-a-ride, and private, human service, veteran, and medical providers, as well as
vouchers. Learn about regional and national initiatives for transportation resource development around Mobility Management, I&R/A networks, and the Veterans Transportation Community Living Initiative. A facilitated small group activity on working through challenging “Find a Ride” scenarios will demonstrate the value of locating resources through network partnerships. Participation will help you get your callers from A to B.

Kenneth Thompson, Easter Seals Project ACTION, Washington, DC; Carolyn Rader, Atlanta Regional Commission, Atlanta, Georgia

Wednesday, June 4
10:45am – 12:15pm
Georgia 7
A-15: “Beyond the Silos: Collaboration Between Behavioral Health and Aging”

Individuals and families contact ADRCs with very complex circumstances which frequently involve challenges associated with mental illness and developmental disabilities. Systems and service providers specializing in mental health, substance use and developmental disabilities as well as the aging network have generally functioned separately, ill-equipped to adequately serve those in need of a coordinated, multidisciplinary approach to receiving care and services. This session will teach participants about screening tools which can help identify persons with behavioral health needs; and on the different types of cross training necessary to truly integrate I&R systems. This session will also provide examples and the opportunity to discuss processes that have been implemented in Georgia aimed at improving access to the full array of community-based services for individuals and families.Eve Byrd, Fuqua Center on Late Life Depression, Atlanta, Georgia; Mary Lou Rhan, Georgia Department of Behavioral Health and Developmental Disabilities, Atlanta, Georgia; Wendy Martinez Schneider, Behavioral Health Link/Georgia Crisis and Access Line, Atlanta, Georgia

Wednesday, June 4
10:45am – 12:15pm
Georgia 8
A-16: “Highlighting Aging and Disability Partnerships through I&R/A Resources”

As aging and disability programming continues to intersect at the national, state, and local levels, I&R Specialists are fielding an increasing number of questions concerning programming for client groups that include older adults, people with disabilities, and their caregivers. This session will present the work that the National I&R Support Center, NASUAD, AIRS, and the National Center for Benefits Outreach and Enrolment (at NCOA), are doing to expand the reach of I&R to help individuals with disabilities and their caregivers find appropriate resources. Presenters will discuss the new “disability competency” section in this year’s ABCs of I&R manual, changes to the CIRS-A certification, and other updates to the Support Center’s training materials. Additionally, presenters will highlight resources available to help older adults and individuals with disabilities access Medicare.


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

“Building Community Partnerships using a Community Needs Assessment to Serve Veterans with Disabilities” (C-6 in the Serving the Military Track)

“Iron Women Project Resource Center: Connecting Warriors with Programs and Services” (C-7 in the Serving the Military Track)

“Wounded Warrior Project Resource Center: Connecting Warriors with Programs and Services” (C-7 in the Serving the Military Track)

“Emergency Planning and Response for the Whole Community: Information, Resources and Tools” (D-4 in the Disaster Track)

“A Disaster by Any Other Name: Exploring I&R’s Role Among Varying Levels of Disasters” (D-5 in the Disaster Track)

“When a Disaster Happens, Are We Prepared?” (D-7 in the Disaster Track)

“Calibration Corner: Best Practices in Ensuring Consistent Call Quality Measures” (E-5 in the Service Delivery Track)

“You Have Data, Now Use It!” (F-3 in the Management Track)

“Growing Deeper Roots: Strengthening I&R/A Partnerships through a Call Monitoring Project” (F-6 in the Management Track)

“Innovations in Social Media: What We Can Learn Across I&R Disciplines” (H-7 in the Technology Track)

“Washington Update: Public Policy and Advocacy” (J-4 in the For Everyone Track)

“One-Call, One-Click Software: Providing I&R Clients with Improved Transportation and Trip Planning Information” (J-9 in the For Everyone Track)

(B) 211 TRACK

Brought to you by 211 US Steering Committee

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

Monday, June 2
1:00pm – 2:15pm
Atlanta 1
B-1: “Development of a Data Dashboard for 211s and their Communities”

This panel will present the 211 Data Dashboard to 211 national leaders and a broader 211 audience. This Data Dashboard displays real-time, key indicators of community needs derived from each 211’s rich dataset, enabling viewers to improve planning, resource allocation and service delivery. It offers insight into local social issues and demonstrates the value of 211 in the community. This dashboard is being developed in collaboration with 211s in North Carolina and Florida.

Matthew W. Kreuter, Washington University in St. Louis, St. Louis, Missouri; Catherine Penrod, Switchboard of Miami, Miami, Florida; Jarred Wilson, Switchboard of Miami, Miami, Florida; Marti Morris, NC 211, Cary, North Carolina; Linda Brinkley, United Way of Asheveille & Buncombe County, Asheville, North Carolina
Monday, June 2
3:00pm – 4:15pm
Georgia 9
B-2: “211: Evolving from a Call Center to a Contact Center”
This session will provide professionals with a step-by-step process for evolving a call center into a multi-functional contact center. The facilitator will share some of the challenges and successes of making this transition from staffing to getting leadership on board to technology. Large and small 211 operations can benefit from suggested strategies provided in this workshop. This is a great session for VP’s, directors and managers who have an interest in developing their centers into a multi-functional contact center.
*Donna Burnham, United Way of Greater Atlanta 211, Atlanta, Georgia*

Tuesday, June 3
8:30am – 10:00am
Georgia 9
B-3: “211 Assembly” (Part One)
This year’s 211 Assembly is presented by the 211 US Steering Committee and will feature a full morning of issues and discussions relevant to the sustainable growth of the 211 movement. Features of the first session include:
- Update from national partners: 211 US, AIRS, UWW
- 211 National Cloud Telephony Initiative – This presentation will teach you aspects of cloud technology and how it is being leveraged by many 211 centers including cost savings for the 211 network through economies of scale.
- Similarities with 211 call centers and contact centers - Learn more how the UW sponsored training for the 211 network compliments the AIRS training. See how it will help further develop necessary skills for 211 managers to operate and manage their individual centers while learning and implementing industry best practices.
*Dave Bartek, 211 US Chair, Detroit, Michigan; Clive Jones, AIRS, Sooke, British Columbia; Lisa Austin, United Way Worldwide, Alexandria, Virginia; Steve Pulley, inContact, Salt Lake City, Utah; Nina Kawalek, The Resource Center, Western Springs, Illinois; Tom Page, 211 Michigan, Lansing, Michigan*

Tuesday, June 3
10:30am – 12:00pm
Georgia 9
B-4: “211 Assembly” (Part Two)
This year’s 211 Assembly is presented by the 211 US Steering Committee and will feature a full morning of issues and discussions relevant to the sustainable growth of the 211 movement. Features of the second session include:
- Coordinated Assessment - Understand the varying vital roles 211’s play in the coordinated assessment process for sheltering services.
- 211’s Role and Future in Health Care - Learn about the new opportunities and future of health, including how in-reach to people already call 211 and opening up new avenues in assessing and connecting clients to community partners.
*Lisa Austin, United Way Worldwide, Alexandria, Virginia; Bill York, 2-1-1*

Tuesday, June 3
2:15pm – 3:30pm
Georgia 9
B-5: “Local Community/Local Sustainability of 211: Choosing a Business Model that Works for Your Community”
When 211 expanded across North America, it was a tremendous accomplishment, but it did not come with funding for most local 211’s. We want 211 to be as ubiquitous as 911 but it is not funded as a public utility. Sustainability of 211 services is a critical issue. Come hear how one community chose to address those issues using local for-profit expertise while remaining true to the mission of 211. This session is for anyone working on/interested in the sustainability of 211 in your community.
*Caty Jink, Greater Twin Cities United Way, Minneapolis, Minnesota; Tracey Lamberty, Ceridian, Minneapolis, Minnesota*

Tuesday, June 3
2:15pm – 3:30pm
Georgia 9
B-6: “211 Partnerships and Collaborations”
United Way of Greater Atlanta (UWGA) 211 teamed up with numerous companies, community agencies, programs, contractors and other UWGA departments throughout the years, as they evolved from a call center to a full-fledged contact center. Through a panel discussion that will consist of a representative from each one of these partnerships/collaborators, they will explore the types of collaborations the UWGA and how 211 can mutually benefit UWGA and other entities through the formation of these outside relationships. This is relevant to and intended for I&R services, non-profit agencies, for-profit companies, and UWGA’s donor prospects. The panel discussion will consist of a Q&A session with a moderator and panelists, followed by a Q&A session with the audience.
*Donna Burnham, United Way of Greater Atlanta 211, Atlanta, Georgia; Keith Barsuhn, United Way of Greater Atlanta 211, Atlanta, Georgia; Nicola Canty, United Way of Greater Atlanta 211, Atlanta, Georgia; Andrea Irvin, United Way of Greater Atlanta 211, Atlanta, Georgia; Dr. Kassandra I. Alcaraz, American Cancer Society, Atlanta, Georgia; Dr. Alicia Best, HEALing Community Center, Atlanta, Georgia; Lucia Bundy, Emory Prevention Research Center, Emory University, Atlanta, Georgia*

Wednesday, June 4
9:00am – 10:30am
Georgia 11
B-7: “Positioning Your 211 To Participate in Health Disparities Research: Opportunities and Challenges”
Every year millions of dollars is allocated to conduct scientific research designed to reduce health disparities and create healthier outcomes for high-risk populations. Learn how to position and promote the value of your 211 service to academic researchers as well as the management challenges associated with conducting research.
*David Smith, United Way of Greater Houston, Houston, Texas; Dr. Katherine Ball Ricks, University of Texas, School of Public Health, Houston, Texas*
## Workshops by Track and Description (cont.)

**Workshops by Track and Description (cont.)**

### (C) SERVING THE MILITARY TRACK

The sessions on this track are geared to educate community and military I&R providers about military resources & programs, and to provide information that will help you provide support to veterans and active duty service members. Remember, anyone can attend any session and that everything in I&R is connected.

**Monday, June 2**
10:00am – 11:30am

**Georgia 8**

- **C-1: “Resources to Support Those Who Defend The Nation”**
  Ever wondered what family support services the veterans in your community had access to while on active duty? We will describe services provided for the "lifecycle" of our Service Members. Not only active duty support, but integrating the veteran back into the community.
  
  Mark Munger, USMC I&R, MCCS, Marine Corps Base, Camp Lejeune, North Carolina; Christopher Eiland, USMC I&R, MCCS, Marine Corps Air Station, Beaufort, South Carolina

**Monday, June 2**
1:00pm – 2:15pm

**Atlanta 2**

- **C-2: “The Intersection of Mental Health Services and Supports for Veterans, Older Adults and Their Caregivers”**
  This session on access to mental health services and supports, is aimed at I&R professionals who work with older adults, veterans of any age, and their caregivers. With perspectives from the Substance Abuse and Mental Health Services Administration (SAMHSA), and the Administration for Community Living, 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.
  
  Stephanie McCladdie, Substance Abuse Mental Health Services Administration, Atlanta, Georgia; Ronald Taylor, U.S. Administration for Community Living, Atlanta, Georgia

**Monday, June 2**
3:00pm – 4:15pm

**Atlanta 1**

- **C-3: “Enabling Successful Reintegration: From Military Service to Civilian Life”**
  Service members continue to struggle with the process of making a successful transition from active duty and back to civilian life. The Department of Defense, in partnership with multiple other government agencies, has made significant strides to better educate Service members on how to make a successful transition before they separate from active service. There still remains a gap in plugging these new veterans in with the many resources available to them. This workshop will help I&R professionals identify many of the resources available for veterans and will help educate I&R professionals on how to help veterans access those resources.
  
  Walter Lavrinovich, Marine & Family Programs Division, HQ, US Marine Corps, Quantico, Virginia; TBA

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**Wednesday, June 4**
10:45am – 12:15pm

**Georgia 9**

- **B-8: “Building a Quality Assurance Program for 211 Centers Using ‘Voice of the Customer’ Research”**
  For 211 call center managers, quality staff and directors, this workshop will demonstrate a new approach to quality monitoring, introducing “voice of the customer” research as a basis for applying consistent agent behaviors and quality assurance reviews throughout the 211 system. Results of an initial benchmark study will be reviewed and a representative of the participating centers will discuss how consistently measuring certain core behaviors will increase quality of service and decrease operational costs.
  
  Barry Maners, The Fraser Group, Greenwood, Indiana; Lisa Austin, United Way Worldwide, Alexandria, Virginia

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**Wednesday, June 4**
2:15pm – 3:30pm

**Atlanta 1**

- **B-9: “211 US Steering Committee Open House” – Final Session**
  This final 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.
  
  Tom Page, 211 Michigan, Lansing, Michigan

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

- **“CDC, Flu on Call, 211 as the ‘Entry’ During Times of a Pandemic”** (D-6 in the Disaster Track)
- **“When a Disaster Happens ... Are We Prepared?”** (D-7 in the Disaster Track)
- **“Big-Small Partnerships that Work: Benefits, Challenges and Integration Issues when 211s & Specialized I&Rs Come Together”** (F-5 in the Management Track)
- **“Service Delivery from the Community Up: An Ontario Approach to Information Management”** (H-1 in the Technology Track)
- **“Use Enterprise Texting and Create a Paradigm Shift: Outcomes, Impact and New Relationships”** (H-3 in the Technology Track)
- **“Thinking Outside the Box: Innovative Collaborations”** (J-1 in the For Everyone Track)
- **“You Say You Want a re:Volution?”** (J-2 in the For Everyone Track)
- **“Successful Approaches to Engaging Community Partners about AIRS: A 211 San Diego Case Study”** (J-3 in the For Everyone Track)
- **“Integrating I&R Resources with Existing Public and Private Resources to Create an Integrated Referral and Coordinated Service Delivery Solution”** (J-5 in the For Everyone Track)
- **“One-Call, One-Click Software: Providing I&R Clients with Improved Transportation and Trip Planning Information”** (J-9 in the For Everyone Track)
Tuesday, June 3
8:30am – 10:00am
Georgia 7
C-4: “The 4 R’s: Today’s Times Means Recognizing, Responding and Providing Resources to Create Results in a Service Member’s Financial Readiness in their Career and Life”
Financial hardships are usually a result of poor financial literacy, economic impacts, and not defining needs, wants and setting goals to succeed. Demographic groups such as junior enlisted service members, single parents, newly divorced or separated individuals, service members with dependents having physical problems, newlyweds, and individuals who have recently relocated are the common demographics most impacted. Preparing service members prior to their career, during their career and prior to transition to the civilian environment is critical especially in today’s economy. This workshop will explore the variety of military initiatives, financial trends among service members, programs and resources that can help service members stabilize their financial situation.
Kelley Faulk, USMC-MFR, Quantico, Virginia

C-5: “Army OneSource: Best Practices for Integrating Military and Civilian Communities”
Army OneSource presents an engaging workshop designed to provide you a better understanding of today’s military population, strategies for collaborating with military agencies, promising practices for military outreach, and how information and referral enhances engagement with community partners.
Shaunya M. Murrill, Installation Management Command, Army OneSource, San Antonio, Texas; Erica Manning, Army OneSource, Reston, Virginia

Tuesday, June 3
10:30am – 12:00pm
Georgia 7
C-6: “Building Community Partnerships Using a Community Needs Assessment to Serve Veterans with Disabilities”
Many veterans experience difficulty when transitioning from a military culture back into the civilian community after their service commitment. For veterans with disabilities, that transition may be even more difficult if additional services and supports are needed to adjust to the civilian world. Both the veteran and civilian communities have an important role in helping veterans integrate back “home”. This session focuses on how to help make the transition easier through collaboration among veteran and community service organizations and presents a community needs assessment model intended to help develop partnerships which lead to innovative program ideas and successful implementation in the community.
Barbara Diehl, Prince William Area Agency on Aging, Woodbridge, Virginia

Wednesday, June 4
9:00am – 10:30am
Atlanta 1
C-7: “Wounded Warrior Project Resource Center: Connecting Warriors with Programs and Services”
The WWP Resource Center is a multi-channel contact center that serves wounded warriors, caregivers, and their families. In addition to responding to specific internal and external resource requests, the center’s representatives proactively reach out to warriors and their families to engage them in available WWP programs and services.
Liliana Blyar, Wounded Warrior Project, Jacksonville, Florida

Wednesday, June 4
10:45am – 12:15pm
Atlanta 1
C-8: “I&R 101 for Military Affairs: Building a Strong I&R Program for Military Affairs to Leverage I&R Data with Community Partnerships to Address Critical Veteran Service Gaps”
In 2008, United Way of Greater Houston began providing specialized military I&R services with an I&R specialist who also provided community outreach. In 2014, the program has grown to an Assistant Manager who oversees the specialized I&R component, extensive community outreach and four dedicated I&R specialists who provide 100% follow-up to veterans/military families who have multiple needs. In 2012, a United Way invested in developing a stronger community for returning veterans and their families. One major component of this investment was using “Community Conversations” with veterans, service providers and community stakeholders to develop the path for moving forward. Using United Way of Greater Houston’s experience developing a sustaining veterans initiative, participants will learn how to join their I&R services with the other aspects of their organizations/partnerships to start or energize a veterans’ initiative in their community.
Curtis McMinn, United Way of Greater Houston, Houston, Texas; Cornelius Blackshear, United Way of Greater Houston, Houston, Texas

(D) DISASTER TRACK

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

Monday, June 2
10:00am – 11:30am
Atlanta 1
D-1: “Emergency Management: Through the Long Lens of AIRS Standards”
What’s your plan when disaster hits in your community? Does your staff know what to do? What’s your role for your community? How do you do I&R when the chaos of disaster strikes? How are you meeting the AIRS Standards of Disaster Preparedness? If you don’t have a
ready answer for each of these questions, this session is for you. Bring your COOP, bring your questions, we’ll work scenarios and look at some tools that have stood the test of the real world.

Mary Cooksey, United Way of Abilene 211 Texas A Call for Help, Abilene, Texas

Monday, June 2
1:00pm – 2:15pm
Atlanta 3
Portions of north and central Georgia were impacted by two significant winter storms during the winter of 2014. While both storms resulted in catastrophic impacts across the area, the impacts from the February storm were primarily meteorological/economical, while the impacts from the January storm were more societal in nature, especially across the Atlanta Metropolitan area. We will discuss the differences between the two storms in how they were handled by emergency officials, the National Weather Service as well as look at the many lessons learned from these two very different events.

Keith Stellman, National Weather Service, Atlanta GA, Peachtree City, Georgia

Monday, June 2
3:00pm – 4:15pm
Atlanta 2
D-3: “Using Open Source Technology to Coordinate Disaster Recovery”
Free, open source, inter-agency coordination technology platforms can improve communication, collaboration and decrease duplication of efforts after a disaster. This session will include case studies from New Jersey 211, 211 Hudson Valley, and Colorado 211’s use of Crisis Cleanup to manage Hurricane Sandy and Colorado flood cleanup efforts.

Aaron Titus, New Jersey 211 Partnership/ Crisis Cleanup, East Hanover, New Jersey; Laura Zink Marx, New Jersey 211 Partnership/ Crisis Cleanup, East Hanover, New Jersey

Tuesday, June 3
8:30am – 10:00am
Atlanta 1
D-4: “Emergency Planning and Response for the Whole Community: Information, Resources and Tools”
People First’s slogan is “Nothing About Us Without Us”. Have you thought about this slogan in the context of technology and emergency preparedness, response and recovery? Come to this dynamic workshop to learn more about how to include people with disabilities, and how to access and functional needs in emergency planning and response. Learn more about how people with disabilities use technology and assistive devices to live, work, play and plan for emergencies. Strategize and learn how ADRCs can promote and encourage people to make personal plans and promote community awareness about emergency preparedness, response and recovery.

Marcie Roth, FEMA, Office of Disability Integration, Washington, DC; Helena Mitchell, GaTech Wireless RERC, Atlanta, Georgia; Rick Wimberly, Galain Solutions, Franklin, Tennessee; Jay Kniskern, GaTech, Tools for Life, Atlanta, Georgia; Jennifer Hogan, Georgia Division of Aging Services, Atlanta, Georgia

Tuesday, June 3
10:30am – 12:00pm
Atlanta 1
D-5: “A Disaster by Any Other Name: Exploring I&R’s Role Among Varying Levels of Disasters”
The word disaster varies by definition dependent upon the discipline that defines it. The medical field may define a disaster as an occurrence that overwhelms a community to meet the demand for healthcare. FEMA may define a disaster as “an occurrence that results in property damage, deaths, and/or injuries to a community”. Whatever the disaster, I&R has a role to play. This workshop will help managers that are somewhat familiar with disaster terms to: understand the different interpretations of “disaster”; realize preparing for a disaster is best done when not in a disaster; think of disaster preparation as an organized process; and realize relationship building is a key part of the disaster plan.

Marla Browne, United Way of Asheville and Buncombe County, Asheville, North Carolina; Jo Ann Johnson, HandsOn River Region, Montgomery, Alabama

Tuesday, June 3
2:15pm – 3:30pm
Georgia 11
D-6: “CDC, Flu on Call. 211 as the ‘Entry’ During Times of a Pandemic”
The CDC in partnership with UWW and AAPCC (American Association for Poison Control Centers) are working together to develop a proof of concept in using 211 and Poison Control Centers (PCC) as an entry way to increase access and information to antivirals during a pandemic. This proof of concept will lift up the work that many 211 and Poison Control Centers are currently doing and perform it in a unified and integrated manner. A single entry point with real-time aggregated reporting demonstrating national reach and local touch.

Lisa Austin, United Way Worldwide, Alexandria, Virginia; Arny Latzer, 211 LA County, San Gabriel, California

Wednesday, June 3
9:00am – 10:30am
Atlanta 2
D-7: “When a Disaster Happens, Are We Prepared?”
This workshop is to inform folks who are working with the vulnerable populations in their community about the tools needed in their areas in case a disaster strikes. 211s and ADRCs can work with entities within their community to bridge any gaps in communication to get the message across. In Anchorage, the ADRC works with the EOC and 211 as well as an internal response team on a continuous basis, training on how to assist folks on how to be prepared in a disaster situation. This workshop will focus on how you can indeed do it.

Karla Wright, ADRC, Department of Health and Human Services, Anchorage, Alaska
The sessions on this track are geared towards issues distinct to I&R Service Delivery. However, there may be sessions here of interest to people working in other areas of I&R. Anyone can attend anything and everything in I&R is connected.

Monday, June 2
10:00am – 11:30am
Atlanta 2
E-1: “Caller Assessment the AIRS Standards Way”
Did you know that AIRS has a definition for assessment? If you didn’t, then this workshop is for you! We’ll discuss not only the AIRS definition, but how to view the various components of the assessment process in light of the caller’s individual situation. Be prepared to apply those new skills in group discussion using actual caller recordings (de-identified for confidentiality reasons).
Sandra Ray, United Way of Greater Houston, Houston, Texas

Monday, June 2
10:00am – 11:30am
Atlanta 3
E-2: “Suicide Risk Assessment Training”
The Suicide Risk Assessment Training will provide a tool for assessing suicide risk. This training will briefly touch on scope of suicide, and addressing and recognizing warning signs of suicide. The main goal is to provide exposure to various suicide assessment forms and orientation on what needs to be asked, and why, when conducting a suicide risk assessment. Then wrap up with the importance of safety planning and documentation, in order to support client but also to reduce risk of liability lawsuits.
Demian Laudisio, Switchboard of Miami, Miami, Florida; Alexandra Rose Schneider, Switchboard of Miami, Miami, Florida

Monday, June 2
1:00pm – 2:15pm
Atlanta 4
E-3: “Tapping into New Community Resources: Medical Surplus Recovery Organizations”
Nearly two million tons of medical surplus products are discarded each year by US hospitals. Much of this surplus is usable and capable of saving lives. Medical Surplus Recovery Organizations (MSROs) collect these usable, but unwanted items and after intensive sorting and quality control, distributes these items to under-resourced medical facilities in the United States and around the world. This session offers an opportunity for I&Rs of all sizes to discuss strategies in accessing these resources to meet community health needs.
Lori Warrens, VisionLink, Boulder, Colorado; Mary Cooksey, United Way of Abilene 211 Texas A Call for Help, Abilene, Texas

Monday, June 2
3:00pm – 4:15pm
Atlanta 3
E-4: “Follow-ups: Completing the Circle of I&R”
This presentation uses the current follow-up program developed by 211info in Portland Oregon that will benefit anyone who has contact with clients after the initial call for resources. It is for the front-line I&R specialists and program managers looking to develop or improve upon quality assurance, outcomes and customer service.
Kurt Perkins, 211info, Portland, Oregon

Tuesday, June 3
8:30am – 10:00am
Atlanta 2
Do you have a quality program? Do you have concerns about how your staff understands the quality program? This workshop will demonstrate the value of the calibration process. In a sample quality calibration, featuring an actual call, we will review the technique of calibration as well as discuss the benefits to your overall quality program.
Pablo Garcia, 211 LA County, San Gabriel, California; Denise Friedman, 211 LA County, San Gabriel, California

Tuesday, June 3
10:30am – 12:00pm
Atlanta 2
E-6: “From Burnout to Self-Care: Inspiring Staff Wellness”
This workshop is intended to help managers recognize and support staff when they are experiencing high levels of stress and possible compassion fatigue. Additionally, highlighting the importance of managers and key staff through a strong self-care plan sets the example for those who may be reluctant or unwilling to take part. The main goal is to pioneer managers towards working with staff in developing a wellness program that can be used in the workplace to reduce the risk of burnout.
Demian Laudisio, Switchboard of Miami, Miami, Florida; Alexandra Rose Schneider, Switchboard of Miami, Miami, Florida

Wednesday, June 3
9:00am – 10:30am
Atlanta 3
E-7: “Crisis Call: Conquering the Panic Response”
Do you panic at the thought of receiving a call from someone in crisis? This workshop will provide you with tools to help better prepare for these instances. We will review how this type of call can affect the I&R specialist and provide tools to manage these responses.
Debbie Ortiz, 211 LA County, San Gabriel, California; Cecilia Larios Bedoya, 211 LA County, San Gabriel, California

Wednesday, June 3
10:45am – 12:15pm
Atlanta 2
E-8: “From the Training Room to the Call Center: How to be a Success!”
Have you ever thought about what makes you a good teacher? In this workshop we will discuss ways to ensure that training reaches all participants in their preferred learning style. We will also discuss how this can help new I&R specialists make the transition from the training room to the live call.
Myieko Clayton, 211 LA County, San Gabriel, California; Raquel Alva, 211 LA County, San Gabriel, California
Workshops by Track and Description (cont.)

(F) MANAGEMENT TRACK

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

Monday, June 2
10:00am – 11:30am
Atlanta 4
F-1: “Managing, Surviving and Thriving on Change Within the I&R Sector”
One of the few things that is constant in the field and practice of I&R is change. The introduction of new programs and services, new technologies, funding allocations, reporting requirements and partnerships, and that is just the tip of the iceberg. There are many reasons why we as individuals find change difficult. We like the familiarity of the processes and functions we have learned over the years which make us feel comfortable in our day-to-day work activities. In this interactive workshop, we will learn how to manage change effectively. In this session, we will cover “The Three Phases of Change”: examples of change in the I&R sector, why we resist change and strategies for managing change.
Faeed Hendry, Findhelp Information Services, Toronto, Ontario

Monday, June 2
1:00pm – 2:15pm
Georgia 11
F-2: “For-Profit Thinking in a Non-Profit World: Ideas for Utilizing Corporate Call Center Practices to Improve Your Non-Profit Call Center”
Who says non-profit organizations can’t be effectively run like a business? Explore corporate call center practices that can be implemented to improve your non-profit call center. This session will focus on business empowerment, accountability, and continued education. No matter how big or small your call center, you can still benefit from these tips, tricks, and tools to introduce specific measurable, improved processes/productivity and strategic agility.
Bryan Lewis, HeartLine 211, Oklahoma City, Oklahoma

Monday, June 2
3:00pm – 4:15pm
Georgia 11
F-3: “You Have Data, Now Use It!”
Are you collecting data during your calls? Are you doing anything with it? You should! Your data shouldn’t serve just as documented answers on your call intake. It has the power to change your clients’ lives, to improve funding allocations to service providers, and to increase the community’s awareness of I&R. Attend this workshop for a discussion to see if you’re collecting your data in a way that can be useful for the community and for some ideas about who might want to use it. This workshop is broad-based and is meant to convey the “why” behind data collection to staff at all levels and how staff who work with external stakeholders can leverage it. This workshop will not address the technical jargon of data collection.
Jessica Rodgers, 211 San Diego, San Diego, California; John Ohanian, 211 San Diego, San Diego, California

Monday, June 2
3:00pm – 4:15pm
Atlanta 4
F-4: “Front-line to Management: What Do I Do Now?”
Are you new to the management role or planning to seek a management role? This workshop will explore the unique changes that an individual will face as they transition. We will discuss communication styles and the challenge of moving from an experienced I&R specialist to a management rookie.
Christopher Castillo, 211 LA County, San Gabriel, California; Cecilia Larios Bedoy, 211 LA County, San Gabriel, California

Tuesday, June 3
8:30am – 10:00am
Atlanta 3
F-5: “Big-Small Partnerships that Work: Benefits, Challenges and Integration Issues when 211s & Specialized I&Rs Come Together”
Managing, soliciting and supporting a partner or vendor contract can be fraught with challenges. Whether you are a large 211 provider or small specialized I&R, successful partnerships are critical to providing quality services and expanding service delivery. This workshop will explore the process of creating & maintaining a big-small partnership, helping participants gain a solid understanding of a strong Request For Proposal; evaluate and write a successful proposal; effectively review proposals and determine the best value; and practical strategies and attitudes than can help make for an ongoing successful partnership.
Paul Scribner, Epilepsy Foundation National Office, Landover, Maryland; Thomas Buckley, Epilepsy Foundation National Office, Landover, Maryland; Caree Jewell, Heart of Florida United Way, Orlando, Florida
Tuesday, June 3
10:30am – 12:00pm
Atlanta 3
F-6: “Growing Deeper Roots: Strengthening I&R/A Partnerships through a Call Monitoring Project”
As a manager, are you looking for innovative ways to build relationships with other I&R agencies in your region/state? In this session, the presenters will share a statewide call monitoring approach that helped build relationships between aging, disability and comprehensive I&R programs and enhanced service delivery and training.
Sandra Ray, United Way of Greater Houston, Houston, Texas

Tuesday, June 3
2:15pm – 3:30pm
Georgia 13
F-7: “Feedback: It Ain’t Just Noise”
An effective feedback process can create genuine opportunities for staff skills improvement. However, it can also be an annoying and unwanted sound caused by messages distorted by a loud squeal or screech. This workshop will explore basic rules for providing feedback that will be both harmonious and productive. While we will not be addressing performance reviews specifically, we will demonstrate how feedback can enhance the review process to the mutual benefit of staff and agency, and become a welcome addition to agency culture.
John Plonski, IMAlive Virtual Crisis Center, Hicksville, New York

Wednesday, June 3
9:00am – 10:30am
Atlanta 4
F-8: “Build a Better Mousetrap: Quality Assurance and Call Specialist Performance Evaluation”
Most organizations utilize a generic I&R specialist evaluation form that does not lend itself well to the type of daily work performed by an I&R specialist. United Way of Greater Houston devoted four years to developing performance expectations, self-assessment and an evaluation form for call specialist appraisals in compliance with AIRS standards. A basic understanding of call specialist performance monitoring (silent/side-by-side monitoring) and helpline metrics (calls offered, handled, average speed of answer, roll over on no answer (RONA), etc.) is helpful to understand how components evolve into a final performance evaluation product. Participants will leave with a solid understanding of the full scope of call specialist performance expectations, performance evaluations, as well as an electronic copy of the forms/products used by the United Way of Greater Houston to incorporate these techniques once the participant leaves the conference. AIRS re-accreditation reviewers in December 2013 recognized United Way’s specialist performance evaluation form as a best practice for the field.
Sandra Ray, United Way of Greater Houston, Houston, Texas

Wednesday, June 3
10:45am – 12:15pm
Wednesday, June 3
2:15pm – 3:30pm
Atlanta 2
F-10: “All Things I&R Management Open House – Final Session”
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.
Erin Goff, United Way of Toledo, Toledo, Ohio; Clive Jones, AIRS, Sooke, British Columbia

If you are a new manager or team coach looking for innovative ideas on how to motivate your team to provide quality customer service, then this workshop is for you. This customer service training will help managers prepare and encourage their employees to provide the highest level of service to all customers.
Cheryl North-Dickerson, United Way of Greater Atlanta 211, Atlanta, Georgia; Kimberly Perkins-Heywood, United Way of Greater Atlanta 211, Atlanta, Georgia

In addition to the sessions listed above, people interested in the Management Track, may also want to check out:
“Calibration Corner: Best Practices in Ensuring Consistent Call Quality Measures” (E-5 in the Service Delivery Track)
“From Burnout to Self-Care: Inspiring Staff Wellness” (E-6 in the Service Delivery Track)
“From the Training Room to the Call Center: How to be a Success!” (E-8 in the Service Delivery Track)
“Innovations in Social Media: What We Can Learn Across I&R Disciplines” (H-7 in the Technology Track)
“Thinking Outside the Box: Innovative Collaborations” (J-1 in the For Everyone Track)
“You Say You Want a ‘re’Voluntion’?” (J-2 in the For Everyone Track)
“Washington Update: Public Policy and Advocacy” (J-4 in the For Everyone Track)
“Have a Coke and a Smile: Distribution Channel Management and Marketing for I&R” (J-6 in the For Everyone Track)
“HIPAA 102, What You Don’t Know About HIPAA Privacy and Security Can Hurt You!” (J-7 in the For Everyone Track)
“Organizational Capacity Building: The Four Core Capacity Model” (J-10 in the For Everyone Track)
“Cultivation Through Stewardship: Learn How To Maintain and Grow Your Donor Database” (J-11 in the For Everyone Track)

(G) RESOURCE DATABASE TRACK
The sessions on this track are geared towards distinct to Resource Database. However, there may be sessions here of interest to people working in other areas of I&R. Remember, anyone can attend any session and that everything in I&R is connected.
Monday, June 2  
10:00am – 11:30am  
Atlanta 5  

G-1: “Resource Database 101”  
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’s Resource Database 101. 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! All are welcome! Free Q&A for any brave enough to endure the entire adrenaline-spraying spectacle!  
Matt Finley, United Way 211 of Greater Cleveland, Cleveland, Ohio

Monday, June 2  
1:00pm – 2:15pm  
Georgia 7  

G-2: “Taming the Beast: Indexing with the AIRS/211 LA County Taxonomy” (Part One)  
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

Monday, June 2  
3:00pm – 4:15pm  
Georgia 7  

G-3: “Taming the Beast: Indexing with the AIRS/211 LA County Taxonomy” (Part Two)  
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

Tuesday, June 3  
8:30am – 10:00am  
Atlanta 4  

G-4: “Resource Database Assembly: The Next Generation” (Part One)  
Part 1: How much wood could a woodchuck chuck, if a woodchuck could chuck wood? Realistically, how many records can a resource specialist reasonably keep updated? This session will explore the results of the 2014 AIRS Resource Database Survey with a discussion of what is and what isn’t happening in regards to update percentages. It will also cover the Complexity Score as developed by Sue Boes of United Way of Southeastern Michigan and how it can be used to determine staffing a resource department and time needed for individual projects.  
Polly Fay, Institute for Human Services/211 HELPLINE, Bath, New York; Lindsay Paulsen, United Way of the Midlands, Omaha, Nebraska; Sue Boes, United Way of Southeastern Michigan, Detroit, Michigan; Edward Perry, 211 Tampa Bay Cares, Clearwater, Florida; Steve Eastwood, 211

Tuesday, June 3  
10:30am – 12:00pm  
Atlanta 4  

G-5: “Resource Database Assembly: The Next Generation” (Part Two)  
Part 2: A woodchuck would chuck as much wood as a woodchuck could chuck if a woodchuck could chuck wood. So, are we doing as much as we possibly can, or are we doing all we can and doing it correctly? What metrics are in place to ensure resource specialists are performing quality work so that we have a quality database? This session will continue to explore the results of the 2014 AIRS Resource Database Survey with a discussion on proposed metrics and an auditing form for individual accountability.  
Polly Fay, Institute for Human Services/211 HELPLINE, Bath, New York; Lindsay Paulsen, United Way of the Midlands, Omaha, Nebraska; Sue Boes, United Way of Southeastern Michigan, Detroit, Michigan; Edward Perry, 211 Tampa Bay Cares, Clearwater, Florida; Steve Eastwood, 211 Arizona; John Allec, Findhelp Information Services, Toronto, Ontario; Cathleen Dwyer, CDK Consulting, New York, New York; Katherine Conlon Fasselius, Iowa COMPASS, Iowa City, Iowa
### Workshops by Track and Description (cont.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Track</th>
<th>Title</th>
<th>Location</th>
<th>Presenters</th>
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</thead>
<tbody>
<tr>
<td>Tuesday, June 3</td>
<td>2:15pm – 3:30pm</td>
<td>Atlanta 3</td>
<td>G-6: “Don’t Let Your Agency Get Left in the Dust: Updating Database Info is a Must”</td>
<td></td>
<td>Polly Fay, Institute for Human Services/211 HELPLINE, Bath, New York</td>
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<td>This workshop will offer an opportunity to follow-up with issues emerging from the other sessions on the Resource Database Track or any unanswered questions still remaining.</td>
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<td>Wednesday, June 3</td>
<td>9:00am – 10:30am</td>
<td>Atlanta 5</td>
<td>G-7: “Tools and Tricks for Improving Any Resource Database or How We Turned Our Database Around While Tripling the Service Area”</td>
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<td>Marioly Botero, United Way of Greater Atlanta 211, Atlanta, Georgia; Matt Cardray, HeartLine 211, Oklahoma City, Oklahoma</td>
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<td>Frustrated, overwhelmed, or fed up with your resource database? Let us share the tools and tricks we developed to take our database from blah to brilliant (or at least on its way). Whether you’re just starting out on your journey, or you’ve already achieved a stellar database but are fearful of what will happen to it as your agency expands, this workshop can help. Discover how to: Create a spreadsheet for measuring and improving parity of resources; Develop templates that save you time while improving consistency; Revise your style guide for increased clarity and consistency; Implement simple procedural changes to enhance communication, productivity, and quality; Build tools that will bridge the divide between resource and I&amp;R staff, to the benefit of both; Fall in love with your database all over again.</td>
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<td>Shannon Ross, Connect2Help, Indianapolis, Indiana</td>
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<td>Wednesday, June 3</td>
<td>10:45am – 12:15pm</td>
<td>Atlanta 3</td>
<td>G-8: “So You’ve Got a Database, Now What?”</td>
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<td>Erin Shilcutt, United Way of Abilene 211, Abilene, Texas; Meighan Middleton, United Way of Greater Houston, Houston, Texas</td>
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<td>Whether you have been in the I&amp;R field for years, are finally getting your feet under you, or have just inherited a database, let’s take a look a closer look at why and how we do what we do: performance measures, quality assurance, and resource analysis.</td>
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<td>Wednesday, June 3</td>
<td>2:15pm – 3:30pm</td>
<td>Atlanta 3</td>
<td>G-9: “Resource Database Open House – Final Session”</td>
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<td>Polly Fay, Institute for Human Services/211 HELPLINE, Bath, New York</td>
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<td>This final 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.</td>
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Specific examples will be shared on how text is allowing I&R and 211 to better support the United Way impact areas of Health, Education and Income, how text allows access to a new client base, and how text can be used to elicit new funding sources. In addition to the panel representatives from Florida, Wisconsin, and Minnesota information on how text is being used in other partner states (Oregon, California, Idaho, Alaska, Maine, Nebraska and Nevada) will be shared.

Caree Jewell, Heart of Florida United Way 211, Orlando, Florida; Mark Kuppe, Canvas Health, Stillwater, Minnesota; Bob Waite, IMPACT 211 Milwaukee, Milwaukee, Wisconsin

Tuesday, June 3
10:30am – 12:00pm
Atlanta 5

H-4: “Innovations in Public Websites: Two Case Studies”
If you think your public resource database search function could be more user-friendly, come learn about guided searches and the folksonomy, a set of terms that work in conjunction with taxonomy terms and that allow people to find results using terms based on their actual searching. Learn about two approaches: in Orange County, California and in the National Capital Region.

Lisa Glass Kornstein, FindCancerServices.com, Edgewater, New Jersey

Tuesday, June 3
2:15pm – 3:30pm
Atlanta 4

H-5: “Database Sharing: The Challenges and Opportunities”
I&R gets data in the hands of people in need; can we share databases to do more? Could a national database be possible? This will discuss integration strategy for our sector and address the hurdles to making it happen, and introduce relevant technology concepts including middleware and API.

Lisa Glass Kornstein, FindCancerServices.com, Edgewater, New Jersey

Wednesday, June 3
9:00am – 10:30am
Georgia 9

H-6: “Introduction to Open Referral”
The Open Referral initiative is sponsored by Code for America, and is exploring partnerships with Google.org, 211, AIRS, independent referral vendors, and local governments. Find out what it means or might mean or does not mean, ask questions and get informed.

Greg Bloom, The Ohana Project, Code for America, San Francisco, California; TBA

Wednesday, June 3
10:45am – 12:15pm
Atlanta 4

H-7: “Innovations in Social Media: What We Can Learn Across I&R Disciplines”
This session will review several innovative and suggested uses for social media (i.e. Facebook, Twitter, YouTube, etc.) across multiple I&R organizations. State and local presenters will highlight new media successes, and discuss how other I&R/A organizations can design their own projects to help with outreach, communication, disaster preparation/recov-
ery, and data collection for tracking success of social media initiatives.

Jennifer Beamer, Atlanta Regional Commission, Atlanta, Georgia; Debra Furtado, Senior Connections, Atlanta, Georgia; Grant Yarbrough, Senior Connections, Atlanta, Georgia

Wednesday, June 3
2:15pm – 3:30pm
Atlanta 4

H-8: “Technology Open House”
This final session facilitated by the AIRS Technology 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 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 Technology Track or any unanswered questions still remaining.

Aaron Blackledge, Geauxpoint, Denham Springs, Louisiana

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

“Development of a Data Dashboard for 211s and their Communities” (B-1 in the 211 Track)

“Using Open Source Technology to Coordinate Disaster Recovery” (D-3 in the Disaster Track)

(K) FOR EVERYONE TRACK

The sessions on this track are geared towards I&R issues both general and specific. There should be sessions here of interest to people working in all areas of I&R. Remember, anyone can attend any session and that everything in I&R is connected.

Monday, June 2
10:00am – 11:30am
Macon

J-1: “Thinking Outside the Box: Innovative Collaborations”
Learn about two innovative approaches to enhancing your I&R operations, The Family Services Initiative is a coordinated intake and service delivery model for all children and families in Pinellas County, Florida. This collective impact partnership model is a prevention and diversion program that helps keep families out of the social services system or provides intensive assistance to those in immediate crisis and in need of support. 211 Tampa Bay Cares, Inc. is one of four core project partners that intervenes with select families and provides assistance in less than 2 hours. In the Twin Cities of Minnesota, you will learn the origins, planning, implementation, outcomes and on-going work of a legal referral training program created through a collaboration between Greater Twin Cities United Way 211 and Call for Justice. Audience members will learn the methodology for creating similar collaborations in their communities.

Micki Thompson, 211 Tampa Bay Cares, Inc., Clearwater, Florida; Edward Perry, 211 Tampa Bay Cares, Inc., Clearwater, Florida; Ellen “Ellie” Krug, Call for Justice LLC, Minneapolis, Minnesota; Caty Jirk, Greater Twin Cities United Way, Minneapolis, Minnesota
J-2: “You Say You Want a ‘re:Volution’?”

You Say You Want a Revolution? Well guess what? The ’60s are over and it’s now time to make your own revolution! As 211 San Diego continues to grow we are reinventing ourselves to meet the needs of our clients and customers. Come find out what 211 San Diego is doing to break the mold to become a world class organization. This isn’t about slow growth or steady improvement over time; this is about full-fledged change. That’s why we’re calling it the 211 re:Volution, join us to hear what we’re doing to redesign, review, reevaluate, reimagine, and reorganize for excellence.

Meg Storer, Bill York, John Ohanian, Claire Oksayan, Jessica Rodgers, Josh Berkstresser, Karis Grounds; 211 San Diego, San Diego, California

J-3: “Successful Approaches to Engaging Community Partners about AIRS: A 211 San Diego Case Study”

In this workshop, you will learn how 211 San Diego used CIRS Certification as a way to connect with and educate their community partners on the value of AIRS in I&R and deliver world class service to their clients. Attendees will learn about the strategy 211 San Diego used to create a series of study sessions centered on the ABCs of I&R to educate community partners on the client centric model of I&R presented in the ABCs. Attendees will learn about the value of CIRS Certification to create business relationships with community partners. This workshop is intended for anyone working in the I&R field who plays a role in disseminating the AIRS Standards in their local community.

Joshua Berkstresser, 211 San Diego, San Diego, California

J-4: “Washington Update: Public Policy and Advocacy”

2014’s Washington Update will examine the new and pending federal legislation relevant to I&R/A this year. The discussion will focus on the Older Americans Act reauthorization, the Affordable Care Act and other important bills. It will also highlight general advocacy strategies for AIRS members to get involved with this critical legislation.

Bob Blancato, Matz, Blancato and Associates, Washington, DC

J-5: “Integrating I&R Resources with Existing Public and Private Resources to Create an Integrated Referral and Coordinated Service Delivery Solution”

In this workshop, you will learn how 211 San Diego used CIRS Certification as a way to connect with and educate their community partners on the value of AIRS in I&R and deliver world class service to their clients. Attendees will learn about the strategy 211 San Diego used to create a series of study sessions centered on the ABCs of I&R to educate community partners on the client centric model of I&R presented in the ABCs. Attendees will learn about the value of CIRS Certification to create business relationships with community partners. This workshop is intended for anyone working in the I&R field who plays a role in disseminating the AIRS Standards in their local community.
This workshop provides an overview of the Kinship Navigator Collaborative, giving details of 211 partnerships in California as well as details on partnerships with county Child Welfare departments and other nonprofit and county agencies that are providing services to kinship families. Geared toward frontline resource people who wish to gain insight into utilizing their database in new areas, and managerial staff who wish to learn about collaboration and managing large-scale data migration.

Vanessa Briseno, 211 California, South Pasadena, California; Senita Cox, iFoster, Truckee, California; Cathleen Dwyer, CDK Consulting, New York, New York

Tuesday, June 3
8:30am – 10:00am
Georgia 13
J-6: “Have a Coke and a Smile: Distribution Channel Management and Marketing for I&R”
Atlanta is the home of Coca-Cola, a product available on every street corner in the world. Discuss how a sophisticated distribution channel system makes that possible, the marketing efforts to let the world know, and how these concepts could make social services more accessible to people in need.
Lisa Glass Kornstein, FindCancerServices.com, Edgewater, New Jersey

Tuesday, June 3
8:30am – 10:00am
Atlanta 5
J-7: “HIPAA 102, What You Don’t Know About HIPAA Privacy and Security Can Hurt You”
The HIPAA Privacy and Security Rules have historically focused on healthcare providers and entities that process health information, but now are expanded out to hundreds of thousands of organizations that don’t realize the significant liability of this expansion. This session will be an overview of the significant changes in the law and how it may affect you. Numerous recent examples will be presented.
Jack Kolk, ACR 2 Solutions, Inc., Lilburn, Georgia

Tuesday, June 3
10:30am – 12:00pm
Georgia 13
J-8: “Outreach Methods for Non-Traditional Communities (African American, Asian American, Hispanic/Latino American, Native American, Pacific Islander, LGBT, Refugee)”
Increase awareness of the growing demographics of seniors of non-traditional communities and the responsibility of I&R to be culturally competent when interacting with seniors of non-traditional communities. Also learn the importance of bringing members from non-traditional communities who specialize in providing services to seniors of non-traditional communities to act as advisers in assessing the lack of services in their community.
Michael Styles, State Division Aging and Adult Services, Salt Lake, Utah

Wednesday, June 3
2:15pm – 3:30pm
Atlanta 5
J-9: “One-Call, One-Click Software: Providing I&R Clients with Improved Transportation and Trip Planning Information”
Referred services are more likely to be used if agencies also provide information on available transportation options. New open source “One Call, One Click” systems can deliver this information both to call center staff and directly to clients. This workshop will assist agency executives in assessing the need for, and implementing, programs to deliver this information to clients.
Sheila Smith, 211 Broward, Fort Lauderdale, Florida; Eric Ziering, Cambridge Systematics, Cambridge, Massachusetts; Janae Futrell, Atlanta Regional Commission, Atlanta, Georgia; Richelle Gosman, U.S. Department of Transportation, Atlanta, Georgia; Jennifer Hibbert, U.S Department of Transportation, Atlanta, Georgia

Wednesday, June 3
9:00am – 10:30am
Georgia 13
J-10: “Organizational Capacity Building: The Four Core Capacity Model”
Nonprofit organizations are typically very effective in developing and growing programs to meet emerging needs in their communities. However, too many organizations focus on creating the new services and keeping administrative costs low instead of building the organizational capacity necessary to achieve their mission effectively, efficiently and sustainably. Participants in this workshop will discuss the typical lifecycle of a nonprofit organization, review the Four Core Capacity Model for organizational capacity building, identify benchmarks for their own organization and then be able to utilize tools and techniques to develop the framework for their own successful capacity building plan.
Patrick J. Rogers, Institute for Human Services, Inc., Bath, New York

Wednesday, June 3
10:45am – 12:15pm
Atlanta 5
J-11: “Cultivation Through Stewardship: Learn How to Maintain and Grow Your Donor Database”
This session is open to all who want to explore effective methods to retain existing donors, reach new donors, and learn how to create efficiencies that allow your nonprofit to spend more time focusing on what matters most, fulfilling its mission.
**Allsup**

**Booth #209**  
300 Allsup Place  
Belleville, IL 62223  
888.841.2126  
Tai Venuti, **Manager of Strategic Alliances**  
t.venuti@allsupinc.com

Allsup is a nationwide provider of Social Security disability, veterans disability appeal and Medicare plan selection services. Allsup professionals deliver specialized services supporting people with disabilities and seniors so they may lead lives that are as financially secure and as healthy as possible. Founded in 1984, the company is based in Belleville, Illinois, near St. Louis. For information on our free services, including disability benefits eligibility screening and education and outreach activities, visit AllsupAlliances.com.

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**Bowman Systems**

**Booth #100, 101**  
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888.580.3831 x 153  
318.213.8780 x 153  
[www.bowmansystems.com](http://www.bowmansystems.com)  
Rob Hosier, **Marketing and Public Relations**  
rhosier@bowmansystems.com

For over 15 years, Bowman Systems has provided industry-leading software systems to the human services industry. Our systems are used in over 3,000 agencies in 48 states and Canada including 211 Call Centers, Crisis Hotlines, AAA/ADRCs, and many other specialized agencies. Our partnership with customers in Information and Referral/Assistance has allowed us to develop flexible, online and mobile, software systems specifically for I&R data collection and case management, and superior reporting for a single call center to large statewide and regional community information systems.

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**Criss Cross Representative Payee Service**

**Booth #210**  
209 W. Pike Street, Suite B  
Clarksburg WV 26301  
800.624.4967  
Amie Darway, **Executive Director**  
Amie.Darway@CrissCross.org

For nearly 30 years, CrissCross’ safe and secure representative payee services have helped thousands of beneficiaries manage benefits. At CrissCross, we pride ourselves on trust and credibility with clients and referral agencies. The compassionate and accountable caseworkers at CrissCross understand that caregiver’s first priority is to provide love and support for family members. At CrissCross, we are passionate about the smallest details of our client’s situations. We offer individualized spending plans, interest-earning accounts, professional record-keeping, bill paying and other administrative services. Our services extend throughout 14 states and we are available from 8 a.m. to 4 p.m., Monday through Friday.

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**DonorCommunity**

**Booth #102**  
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Sunrise, FL 33324  
305.992.6041  
[www.donorcommunity.com](http://www.donorcommunity.com)  
David Blyer, **President**  
dblyer@donorcommunity.com

DonorCommunity helps nonprofit organizations cultivate donors, forge closer relationships with stakeholders, engage their communities and raise funds year-round. Our fully integrated, all-inclusive suite of cloud computing applications encompasses CRM, online auctions, online marketing, online donations, event management, personal fundraising, social networking and Web content management. For more information, visit www.DonorCommunity.com.
Eldercare Locator
Booth #307
1730 Rhode Island Avenue, NW, Suite 1200
Washington, DC 20036
800.677.1116
www.eldercare.gov
Mary Osborne, Program Manager
mosborne@n4a.org
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 for Community Living (ACL). The Eldercare Locator is administered by the National Association of Area Agencies on Aging (n4a). Call 800.677.1116 or visit www.eldercare.gov.

iCarol/CharityLogic
Booth #108
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416.907.4354
www.iCarol.com
Neil McKechnie, Director of Services
neil@icarol.com
iCarol is I&R software that fully supports the AIRS standards and taxonomy. It’s used by 42,000 people worldwide, including 11 state/provincial 211 networks and hundreds of I&R centers. You can quickly deploy live chat and 2-way texting/SMS, build regional collaboratives, integrate with telephone systems, and gain access with iPhones, iPads, and Android devices. Our clients rave about iCarol’s responsive support team, agility with deploying new features, and a modern easy-to-use interface.

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Suite 500
866.739.2886
www.incontact.com
Steve Pulley, Account Executive
steve.pulley@incontact.com
inContact is the cloud contact center leader, helping organizations around the globe create high quality customer experiences. inContact is 100 percent focused on the cloud and is the only provider to combine cloud software with an enterprise-class telecommunications network for a complete customer interaction solution. Winner of Frost & Sullivan 2012 North American Cloud Company of the Year in Cloud Contact Center Solutions, inContact has deployed over 1,300 cloud contact center instances. To learn more, visit www.inContact.com.

LanguageLine Solutions
Booth #304
One Lower Ragsdale Drive, Bldg. 2
Monterey, CA 93940
703.361.9308
www.languageline.com
Scott Sonnenberg, Strategic Account Representative
ssonnenberg@languageline.com
Whenever your agency faces language barriers, LanguageLine Solutions provides flexible, cost-effective solutions that enable you to serve callers more efficiently. Trained telephone interpreters are available in seconds, 24/7/365, to assist you in helping callers in more than 200 languages, improving service delivery and your image in the community. Considering bilingual staff? Our language proficiency testing ensures they have the necessary language skills to provide accurate information in other languages, supporting the safety and well-being of your callers. For information on our solutions for AIRS members, visit us in Booth #304 or www.languageline.com.

National AgrAbility Project, Goodwill of the Finger Lakes - National Disability Partner
Booth #206
4119 Lakeville Road
Geneseo, NY 14454
585.447.9015
www.agrability.org
JoBeth Rath, AgrAbility Coordinator for Goodwill
jbrath@abvi-goodwill.com
AgrAbility is a program sponsored by the U.S. Department of Agriculture that provides assistance to farmers, ranchers, and other agricultural workers, and farm family members impacted by disability. The program consists of a National Project and 23 State/Regional Projects. As the national disability partner and the supporting organization for 211 Finger Lakes, Goodwill of the Finger Lakes understands the importance of connecting individuals to the services that can benefit them most. We hope to create an awareness of the program to all Information & Referral professionals across the country.

National Association of States United for Aging and Disabilities (NASUAD) & The National I&R Support Center
Booth # 305
1201 15th Street, NW, Suite 350
Washington, DC 20005
202.898.2578
www.nasuad.org
Sara Tribe, Director, National I&R Support Center
stribe@nasuad.org
NASUAD represents the nation’s 56 state and territorial agencies on aging and disabilities and supports visionary state leadership, the advancement of state systems innovation, and the articulation of national policies that support home and community based services for older adults and individuals with disabilities. NASUAD administers the National Information and Referral (I&R) Support Center, which provides I&R/A systems design and management, training, technical assistance, service delivery, and professional staff development supports to state and local aging and disability networks. Funding for the Support Center is provided through the Administration on Community Living, U.S. Department of Health and Human Services.
National Association of Area Agencies on Aging (n4a)
Booth #306
1730 Rhode Island Ave., NW, Suite 1200
Washington, DC 20036
202.872.0888
www.n4a.org
Mark Fetterhoff, Deputy Director, Communications
mfetterhoff@n4a.org
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.

Optimal Phone Interpreters
Booth #107
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Winter Park FL 32789
866.380.9410
www.callopi.com
Jackie Snook, Vice President
JSnook@callopi.com
Optimal Phone Interpreters is a national company providing instant telephonic interpretation services in over 200 languages 24/7/365. We provide services to a variety of clients including 211 call centers. Our interpreters are professionals who have passed a thorough testing and training process. Our quality assurance department ensures on-going compliance with protocols. We also provide document translation. OPI lets you communicate in all languages, all the time. Call us at 877.746.4674 to begin service.

RTM Designs
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Arden, NC 28704
Julie Banuelos
julie@rtmdesigns.com
888.933.5052
www.rtmdesigns.com
RTM Designs is a leading provider of I & R software solutions with the largest 211 customer base in North America. With over 40 statewide and multi-county networks in operation, RTM Designs understands what it takes to bring people and services together. At RTM Designs, we are committed to helping you help others.

RTZ Associates, Inc.
Booth #109
150 Grand Avenue, Suite 201
Oakland, CA  94612
Laura Emery, Senior Associate
info@rtzassociates.com
510.986.6700
www.rtzassociates.com
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.

Social Security Administration
Booth #205
6401 Security Blvd, 3424 Annex
Baltimore, MD 21235
800.772.1213
www.socialsecurity.gov
Lydia E. Chevere
lydia.chevere@ssa.gov
The Social Security Administration provides partial replacement of earnings lost due to the retirement, death, or disability of a worker. Payments are based on how much the worker earned during his or hers working career. You can find specific information about these programs by visiting www.socialsecurity.gov. You also can set up a my Social Security account and use your account to access your Social Security Statement to check your earnings and get your benefit estimates. If you currently receive benefits, you can get your benefit verification letter; change your address and phone number; or start or change your direct deposit.

VisionLink, Inc.
Booth #110
3101 Iris Avenue Suite 240
Boulder, CO 80301
303.402.0170
www.visionlink.org
Lisa Hrivnak, Manager
Hrivnak@visionlink.org
VisionLink's CommunityOS® software manages about one of every four calls made to 211 nationwide. It is also the system of record for nearly every disaster (70,000 per year) in the US and helps countless other human services with daily operations. Used by the American Red Cross and 211 Texas, the CommunityOS provides tools that allow you to collaborate with others, lower costs, and better deliver services to those in need.
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<th>Name</th>
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<td>American Cancer Society</td>
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<tr>
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<tr>
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<tr>
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<td>lm <a href="mailto:Marx@nj211.org">Marx@nj211.org</a></td>
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### Exhibit Hall Floor Plan

<table>
<thead>
<tr>
<th>Company</th>
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<td>AgrAbility Project</td>
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