



*NEW: PATHS is  
Coming Up Roses  
In Portland*

Annual Training Conference  
August 14-17, 2011  
Red Lion on the River  
Portland, OR

**2011  
SPEAKERS  
DIRECTORY**



**National Eligibility Workers Association**  
*Professionals Associated Through Human Services*

# 2011 Speakers Directory

## Guest Speakers

### Opening Keynote- Judy Gerrard



**Judy Gerrard, Manager, Organization & Employee Development Services Oregon  
Department of Human Services and Oregon Health Authority  
Judy.l.gerrard@state.or.us**

A leader with hands on experience in developing staff and mentoring programs. Having started her career as an eligibility worker, she has spent the last 25 years in employee training and organization development, serving the Oregon Department of Human Services, designing and delivering training via classroom, satellite broadcasts, video productions and webinars; providing internal consulting services to public agencies, facilitating organization and team development. She is known for dynamic, interactive presentations where the audience is engaged and contributes. A mentoring component has consistently been a feature of programs she has worked on, be it training Eligibility Workers, Leadership Development programs, Management Training, or career development workshops.

### **“Inspire and Grow Through Mentoring”**

Facilitating employee growth and development, improving morale and preparing future leaders, mentoring raises the bar on performance and contributes to being an effective organization. Mentoring can be through a formal program, or informally arranged. Whether as a mentee or mentor, explore what it takes to have an inspiring learning partnership. Judy will share from her experiences, lessons learned, best practices and testimonials for mentoring that will help you to create your own programs or learning partnerships. Participants will get ideas, tips, and techniques to develop effective mentoring partnerships and gain resources for developing a mentoring culture in their organizations.

### Closing Keynote- Scott Friedman



**Scott Friedman CSP, (Certified Speaking Professional), 2004-05 President of the National Speakers Association** [Scott@funnyScott.com](mailto:Scott@funnyScott.com)

- Sometimes, the best way to learn is by laughing! Scott Friedman is a motivational humorist who gets audience members laughing while opening their minds to new ideas. With over 2200 speeches in his 25-year speaking career, Scott knows how to connect with audiences worldwide. With a sharp sense of cultural diversity, Scott appropriately crafts his message to bring relevant value to his audiences. He brings a fresh global perspective to his programs about the changing worlds of employee engagement, customer engagement, branded customer service, personal branding, and humor as a tool in sales, service, public speaking, and change management. His improvisational skills, customized humor, and delightful nature add a refreshing quality to each program.

### **“The Best Way to Predict the Future is to Create It”**

In these turbulent, globally competitive times, innovation and resourcefulness are essential to survival. This renowned program is fast-paced, humorous, and full of useable ideas on becoming a victor of change instead of a victim. Create a greater self-awareness as you learn to be driven by your values and purpose, rather than circumstances and emotions. Scott will provide the tools to create an environment that fosters creativity and team spirit. As employees become more engaged, innovation, creativity and productivity rise. “The Best Way” makes a great closing speech, leaving participants feeling better about themselves, their responsibilities, and their roles for the future.

## APHSA Town Hall Follow-Up

**Presenter: Larry Goolsby** – [Larry.goolsby@aphsa.org](mailto:Larry.goolsby@aphsa.org) - Director of Strategic Initiatives

The recently passed health care reform legislation will undoubtedly impact all health and human service systems on every level of government. “Interoperability” is the new buzz word that reflects the opportunities for streamlining policies, programs, and processes that capture common data elements and enable sharing information across health and human service lines. This presentation will discuss the states’ perspective on the opportunities and challenges of interoperability presented by health care reform.

## Benefit Enrollment Centers

**Presenters: Josh Wertheimer- Project Associate, National Council on Aging** [josh.wertheimer@ncoa.org](mailto:josh.wertheimer@ncoa.org)  
**Jeanie Butler- Oregon Benefits Enrollment Center**

How would your job be easier if you could work with a trusted, knowledgeable community partner that helped individual seniors and adults with disabilities assemble “clean”, complete applications for you to evaluate? In this session we will discuss the work being done by twenty Benefit Enrollment Centers (BEC) around the country that assist seniors and adults with disabilities in completing applications for Medicaid, Medicare Savings Plans, SNAP, LIHEAP (energy assistance) and more. You will learn about the creative ways in which these BECs are partnering with their local eligibility workers to make everyone’s lives easier, including the individual applicants.

**Moderator Comments: No name listed** - Very insightful presentation what efforts benefit enrollment centers are making to assist seniors access benefits, understand what they may be eligible for and how to use them and to keep benefits current and open.

## Connecting Generations

**Presenter: Douglas Bloom** - [Douglas.bloom@state.or.us](mailto:Douglas.bloom@state.or.us) - Oregon DHS, Training and Development Specialist II

Individuals develop their perspectives during their formative years based in large part on world events, economic conditions, technology and parenting styles of the era. Since generations share a place in history, they tend to develop their own unique personalities.

Understanding these personalities and using that understanding makes people far more effective at work and at home. Master communicators establish rapport with generational differences in mind. Connecting with a variety of generations helps people create more effective relationships, thus improving business results by applying generational dynamics to workplace situations.

**Moderator Comments: Janet Helbling** - Presentation demonstrated how to communicate/work/get along with others from all generations in the workplace. How to motivate others and what makes people from each generation click were explained.

Fantastic presentation!

## Discovering Your True Colors

**Presenter: Jennifer Sipe** - [jsipe@surewest.net](mailto:jsipe@surewest.net) - Certified True Colors Facilitator; NEW: PATHS Board Member (CA)

Each of us has our own style, preferences and ways of working. So how can we all work/live together? The True Colors® Personal Success workshop helps participants explore their own and others’ distinctive personality strengths and stressors. They learn to respect and appreciate differences in the ways people function and better understand relationship building, effective communication and team effort.

## Five Tricks for Creating a Welcoming Environment

**Presenter:** Judy Gerrard - [Judy.J.gerrard@state.or.us](mailto:Judy.J.gerrard@state.or.us) - Manager, Organization & Employee Development Services Oregon Department of Human Services and Oregon Health Authority.

Diversity and learning to be culturally informed are important aspects of the work we do in serving the public. It also impacts how well we interact with each other in the office. This highly engaging and interactive session will explore concepts of “a welcoming environment” and why it’s an everyday thing, not just in the morning, or at the front desk; and not just for the new employee or new client, but for you and everyone else, too. It means more than how the furniture is arranged or what’s hung on the wall in the lobby. You will get ideas about what you need to feel the office environment is welcoming to you; actions you can take to create a welcoming office environment for others. This workshop is designed to be fun, yet practical and leaves participants with checklists and guidelines that can be implemented upon return to the office.

## NCOA Town Hall Follow-Up

**Presenter:** Hilary Dalin-[Hilary.Dalin@ncoa.org](mailto:Hilary.Dalin@ncoa.org) - Director, Benefits Access Policy and Programs

NCOA is a national voice for older Americans and the community organizations that serve them. Health care costs are rising, job opportunities are drying up, and retirement accounts are taking a hit. More than 13 million seniors struggle every day to make ends meet. Too many have to decide whether to use their fixed income to pay for heat, food, or medicine. Here's how we help.

**Moderator Comments:** Brenda Kellogg – Discussion included Welcome to Medicare and 2011 Preventive Services including an annual Wellness visit at no cost to beneficiaries. Miss Dalin covered some of the changes that will take place from 2014 to 2019.

## Non-TANF Intake Model – Same Day/Next Day Intakes Standardized Across the State

**Presenters:** Julie Fosback - [Julie.fosback@state.or.us](mailto:Julie.fosback@state.or.us) - Eligibility Worker with DHS Self-Sufficiency Programs  
Melissa Clark - [Melissa.clark@state.or.us](mailto:Melissa.clark@state.or.us) - Supervisor with DHS  
Christy Williams - [Christy.J.Williams@state.or.us](mailto:Christy.J.Williams@state.or.us) - Manager of the DHS Children and Families Continuous Improvement Unit

This workshop will provide information on how we got there two years ago and where we are now in regards to the Same Day/Next Day Intake Model for Non-TANF cases in Oregon. In addition to a presentation, there will be a panel of presenters able to address questions specific to their various roles.

Individuals will be able to gather information pertaining to Lean concepts including Lean Daily Management, Rapid Process Improvements, statewide roll out strategies and see how it applies to standardizing and gaining efficiencies and improved SNAP benefits. The USDA recently announced that Oregon was ranked fourth in the nation for “Best Negative Error Rate.” This means we continue to make accurate payments to clients who need help putting food on the table.

## Open Space: Talk with Your Peers

**Presenter:** Carolyn Ross - [Carolyn.Ross@state.or.us](mailto:Carolyn.Ross@state.or.us) - NEW: PATHS Board Member (OR)

50 states doing the same job in 50 different ways. “Open Space” brings you together with your colleagues to have a discussion on workload issues and Best Practices. This will be an interactive discussion and opportunity for peer-to-peer learning. In this open space session, attendees can suggest topics, gather ideas, discuss best practices, ask questions and learn from each other. The content is by attendees, for attendees.)

**Moderator Comments:** Wanda Shain - . "What is working and what isn't?" Those questions were discussed by workers from Alaska, New York, Wyoming and Oregon. Alaska moved to the new team process March 1, 2011

and they are still in the process of working some of the things out. What they are doing is described as today's work done today. Workers are split into four teams that do different duties. These 4 teams rotate duties so everyone stays up to date on different program policies. Workers from Alaska seem to like this new way of doing business because they have no case load and feel like they are giving better customer service.

Oregon has the same concept as Alaska of "today's work is done today." Clients are seen the same day they come into the office. Wyoming is only one of two states in the US that don't have simplified reporting. Wyoming conducts a majority of interviews by phone which is a great time saver for workers, and clients love it. Staff from all the states discussed what they would like in a perfect world and as you can imagine, the list was long! All agreed that in order to survive in today's world, we were going to have to change the way we do business in order to deal with increased caseloads and still provide excellent customer service.

## **SNAP Town Hall Follow-Up**

**Presenters: Angela Kline** – [angela.kline@fns.usda.gov](mailto:angela.kline@fns.usda.gov) - Certification Policy Branch Chief, Program Development Division SNAP, USDA

**Jackie Windfeldt**- [Jackie.windfeldt@fns.usda.gov](mailto:Jackie.windfeldt@fns.usda.gov) - Program Analyst, Program Design Branch, Food and Nutrition Service

Learn about SNAP policy on non-citizen eligibility, including a historical perspective, the impact of changes made under PWRORA and the 2002 Farm Bill, and the barriers to program access that impact immigrant households.

## **Surviving Change**

**Presenter: Darlene Kelly** - [Darlene.Kelly@state.or.us](mailto:Darlene.Kelly@state.or.us) - Oregon **DHS Self-Sufficiency Program (SSP) Training team**

Do you ever feel overwhelmed with the changes you face at work or in your personal life? The pace and volume of change in today's workplace can feel unmanageable. Change is here to stay ... so what can you do to accept, anticipate, and prepare for change?

This course will help human service workers to recognize "change" as a part of the work. Join us to explore effective strategies to not only, survive change, but to create opportunity and understanding in the workplace

**Moderator Comments: Sandy Fisher** - Darlene explained the cycle of change, the levels of change along with the rolls we play in it. She also explained the types of stress which are fight or flight, adapting to it and Interpretation.

**Robert Barton** - Ms. Kelly addressed passive and negative stressors in your work and personal life. Once the stressful situations were noted Ms. Kelly turned the situation towards identifying coping skills. Miss Kelley's presentation involved all who were present and was well received by the participants.

## **The Financial Values of Medicare Savings Programs:**

**Presenters: Linda Bylow** - [lbylow@sscincorporated.com](mailto:lbylow@sscincorporated.com) - SSC Government Relations Western Regional Director.

**Vicki Jessup** - [vjessup@sscincorporated.com](mailto:vjessup@sscincorporated.com) - Director of Government Relations for the Midwestern Region.

Discover the far-reaching potential financial value that Medicare Savings Programs (MSP), Extra Help (LIS) and Golden Touch programs can bring to your clients who are low income seniors and people with disabilities. SSC's national outreach assistance links, Medicare recipients with valuable programs that can assist them with Medicare premiums, prescription drug costs and much more. Our goal is to submit complete and easy to process MSP application packets that will result in significant benefits for eligible clients.

## Using Humor for a Change

**Presenter:** Scott Friedman- [Scott@funnyScott.com](mailto:Scott@funnyScott.com) - Certified Speaking Professional, Motivational Humorist

Become unforgettable. Jump-start your creativity. Gain control of tense situations. Create a positive culture. Engage employees. Engage customers. Reduce burnout. Raise productivity. Build better relationships. And enjoy work more than ever before! *What makes this all happen? The effective use of humor in the workplace.*

Using positive humor creates an immediate bond between people, evoking feelings of camaraderie. Humor enhances receptivity, reduces resistance, and sets a tone of familiar cooperation rather than contention.

This interactive program explores how to use humor, creativity, and engagement strategies to make an organization more positive, productive, and fun. You will learn to tap into your unique sense of humor... a skill essential to creating the rapport that will pave the way to better relationships and better results. By putting the tools and tactics from this entertaining and insightful program into play, you will soon discover that *those who laugh, last!*

**Moderator comments: Robert Barton** - Mr. Friedman showed the workshop participants how to inject humor into their daily lives to help cope with the stresses of work and life.