

CAI&RS

NEWSLETTER

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CALIFORNIA ALLIANCE OF INFORMATION AND REFERRAL SERVICES

2-1-1 Service Launched in Santa Clara County by United Way

United Way Silicon Valley officially launched its 2-1-1 Santa Clara County information and referral service on February 9 with a celebration event that brought together more than 200 stakeholders, including donors, elected officials, and community and business leaders. The launch of 2-1-1 in Santa Clara County means an additional 1.7 million Californians now have access to this vital public service.

Based on similar call centers, United Way Silicon Valley is anticipating about 40,000 calls the first year. The call volume is expected to double within three to four years, which would require an annual operating budget of about \$1.3 million.

The 2-1-1 Santa Clara County call center is staffed locally by a 2-1-1 manager and a 2-1-1 resource database specialist. United Way Silicon Valley is benefiting from the expertise of long-time 2-1-1 provider Interface Children and Family Services in Ventura County by contracting with the agency for call center services.

Answering the Call

“This has been a long time in coming. If United Way Silicon Valley had not stepped up and led the effort, we would still be without this invaluable public service,” said Mary Davey, a current United Way Silicon Valley board member and founding chair of the 2-1-1 Santa Clara County Steering Committee. “United Way brought together county and city governments, community-based organizations and law enforcement, as well as business and community leaders, to work together, build on each other’s strengths, and bring 2-1-1 to Santa Clara County.”

In the fall of 2001, United Way Silicon Valley organized the steering committee and since then has been leading the effort to bring 2-1-1 to Santa Clara County. The organization was approved by the California Public Utilities Commission as the official provider of 2-1-1 Santa Clara County in September 2006.

Committing \$150,000 in seed money, United Way Silicon Valley conducted an aggressive fundraising campaign to launch 2-1-1 that included contributions from both the public and private sectors totaling nearly \$1 million. Major contributors included Dick and Sue Levy, County of Santa Clara, First 5 Santa Clara County, Kaiser Permanente, The Health Trust, and IBM, as well as many other private and public donors.

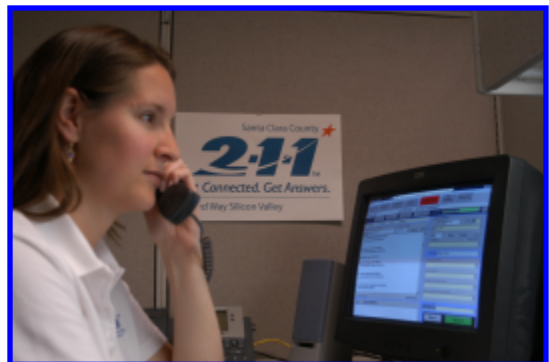
Spreading the Word

United Way Silicon Valley launched a major public information campaign to promote the 2-1-1 service beginning with the launch event on February 9. As part of its public information strategy, United Way secured extensive media coverage of the 2-1-1 breakfast event and launch which resulted in a significant spike in call volume. A news story about 2-1-1 aired on all five major television stations and nine radio stations. Print coverage included a cover story and editorial in the *San Jose Mercury News* as well as articles in 16 other area newspapers, including Spanish, Vietnamese, Korean and Chinese papers.

Television public service announcements about 2-1-1 were produced in English, Spanish, Vietnamese, Tagalog and Chinese and are airing on all major television stations, and United Way spokespeople have appeared on radio and television public affairs programs to talk about the benefits of 2-1-1.

United Way Silicon Valley is also conducting a targeted outreach campaign to promote the service through newsletters, websites, community events, presentations, and other promotional activities. 2-1-1 posters and brochures were produced in English, Spanish, Vietnamese, Tagalog and Chinese. To streamline distribution to community organizations, community centers, libraries, and other locations where people gather, United Way created “2-1-1 in a Bag,” which includes the posters and brochures as well as other promotional items.

—Caitlin Kerk



Kirstin H. Ruf, 2-1-1 Santa Clara County Manager, oversees the 2-1-1 information and referral service at United Way Silicon Valley.

Letter from the President . . .

Dear CAIRS Members,

Over the past two years, several counties have made significant progress in implementing 2-1-1. With the launch of Santa Clara County, 2-1-1 is now available to over 60 percent of Californians in nine counties. An additional eight counties should have the service by the end of 2007 including Alameda, Contra Costa, Kern, Marin, Napa, Sacramento, Solano and Stanislaus.



In 2005, CAIRS and the United Ways of California joined together under the umbrella of 2-1-1 California to develop a 2-1-1 business plan that targeted statewide implementation by 2010. Completed in 2006, this plan serves as the blueprint for implementation activities and 2-1-1 California now includes Volunteer Centers of California, and both the Governor's Office of Emergency Services and California Volunteers. However, a large number of counties, primarily in rural parts of the state, continue to have no comprehensive I&R and no active plans to achieve coverage. Therefore, 2-1-1 California plans to contact all counties over the summer of 2007 to gather the latest information on local efforts to develop the partnerships and funding required to make 2-1-1 a reality. In addition to data gathering, there will be two types of events:

- ♦ In July and August, we will hold 2-3 regional meetings with special attention to areas without established 2-1-1 plans. The purpose will be to build connections, identify resources, and establish interest.
- ♦ In September 2007, 2-1-1 California will bring together 2-1-1 supporters from across the state in a summit to explore the barriers to achieving local coverage, build capacity by sharing lessons learned, and develop specific strategies to achieve 100% coverage by 2010.

A key to the 2-1-1 California statewide strategy for sustainable funding is building long-term value-based partnerships with statewide organizations that can benefit from 2-1-1. In addition to the regional meetings and the 2-1-1 summit, 2-1-1 California is planning to commission a study to quantify the cost for state agencies of creating and maintaining 800#s. This study will build on research completed in other states, as well as data collected through the California statewide planning process. The 2-1-1 California team is gathering the qualifications of interested firms and consultants who are qualified to conduct the study in anticipation of launching work in June, 2007.

Finally, 2-1-1 California is commissioning the development of a technology plan to explore telephony and database options. *This plan will support a cohesive statewide system to advance the goal of ubiquitous coverage by 2010.*

—Maribel Marin

CAIRS Calendar 2007-2008

- July 11 CAIRS Board Conference Call (2:00-4:00 PM)
 July/August 2-1-1 Regional Meetings
 Sept. 28 **2-1-1 Summit Meeting - Sacramento**
 Watch CAIRS website for details on Summit meeting to build consensus on specific strategy to achieve statewide 2-1-1 coverage by 2010.
 Nov. 15-16 CAIRS Board Meeting/Retreat - Asilomar
 Spring 08 CAIRS Annual Conference - San Jose, Davis or Sacramento
 Visit www.cairs.org/conferences.htm for more information
 Dates and locations subject to change

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The CAIRS newsletter is provided as a benefit to all CAIRS members. Please contact CAIRS if you wish to reprint any part of this newsletter.

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United Ways of California Day at the Capitol a Success

Editor's Note: United Ways of California recently met with legislative leaders and state officials in Sacramento to discuss United Way's public policy agenda, including the need for support for 2-1-1 in our state. The following report was filed following the Capitol Day meetings.

By Mark Walker, President, United Ways of California

On May 2, 2007, eight United Way Chief Professional Officers, six board members, Lovell Mosely from United Way of America and 10 senior staff gathered in Sacramento for our first joint day of advocacy for key issues. Eleven California United Ways were represented by 25 participants.

The day began with the group gathering at the California Chamber of Commerce Conference Room for breakfast and speakers. Mark Walker, President and Chief Executive Officer of United Way Silicon Valley, welcomed everyone and introduced the first speaker, Laura Hogan, Vice President of Programs for The California Endowment. Mary Lou Goeke, Executive Director of United Way of Santa Cruz County and Chair of United Ways of California Public Policy Committee, then introduced Assemblyman John Laird, Chair of the Budget Committee and author of AB 1, a bill that expands health coverage to all children in California.

Both Ms. Hogan and Assemblyman Laird emphasized the need to advocate and the important role United Way can play in bringing important issues to their constituents and to the attention of legislators. The California Endowment has funded United Ways of California for the past three years to educate and advocate for the expansion of health coverage to all children in California. Assemblyman Laird shared valuable tips for how to talk to legislators in the Capitol about our children's issue within the context of the larger health reform debate this year, acknowledging the effort and need while emphasizing that children need coverage in 2007.

The participants were briefed on the talking points and materials in the packets by Judy Darnell, State Advocacy Director for Covering California's Children, before heading to meetings in the Capitol.

Four topics were presented to legislators. First, legislators were briefed on United Ways of California – who we are, what we are doing in public policy and our plans for future. Secondly, United Ways of California's three main public policy issues were presented: children's coverage expansion, 2-1-1, and financial stability.

After a rigorous morning walking the halls...and getting lost, the group gathered for lunch and two wonderful speakers. Secretary Kim Belshe of the California Health and Human Services Agency led off with a talk about Opportunities for Change, HHS's priorities and an overview of the Governor's health reform proposal. All present saw the tremendous overlap between HHS's and United Way's priorities. An opportunity for partnership was evident as she spoke of the HHS approach to change: strategic, informed, humble and collaborative.

Daniel Zingale, Senior Advisor to Governor Schwarzenegger and Chief of Staff for First Lady Maria Shriver, was open and gracious as he talked about the tremendous impact an organization like United Way can have both in advocacy and partnership with state agencies. After a short talk he opened it up for a casual question and answer period.

In the afternoon, participants held more meetings while some members of the Executive Committee met with the Governor's office, the Health and Human Services agency and California Volunteers. These meetings were incredibly productive and we identified potential partners for future work on 2-1-1, financial stability and health.

Meanwhile, in the over 50 meetings held with legislators, several members and their staffs showed active interest in working with us on future 2-1-1 legislation.

At day's end the group came together for celebration at the Hyatt Hotel. The consensus was that our first of many Days at the Capitol was a resounding success and United Ways of California's name reached a higher profile within the State Capitol.



Reach a Statewide Audience with CAIRS

Have a conference, service or product you want to promote statewide? Consider purchasing ads in the CAIRS Newsletter. The current circulation is over 200, with membership in CAIRS continuing to grow. We are offering very low advertising rates:

For-Profit rate = \$400 for 4 quarter page ads (\$100 per ad)

Non-Profit rate = \$200 for 4 quarter page ads (\$50 per ad)

If you are interested contact Barbara Bernstein at (510) 537-2710, ext. 8; or by email: bbernstein@edenir.org





Scams Against Seniors

In the last few years seniors have become the focal point of scam artists. Seniors are seen as being very trusting as well as holding the majority of liquid assets in our country.

Across the nation we hear stories of our most vulnerable populations being taken advantage of on a daily basis, losing hundreds of thousands of dollars every year. Seniors are being targeted by individuals who are playing on their fears of not having enough money to last them through retirement. Offers to make them rich or that they have just won the lotto come via the mail, over the phone and even email asking for amounts ranging from the need to verify their banking information to sending money via Western Union.

Common Elder Abuse Scams:

“You’re a Sweepstakes Winner!” Elder gets a call or letter saying they have just won a big “prize” but must first send money for “taxes” or fees before getting their prize.

Fortune-Teller or Psychic Healer: Elder’s money or jewelry is “cursed” and must be given to a fortuneteller to remove the “curse”.

“I’ll fix your roof or driveway - cheap!” Elder pays cash to a door-to-door solicitor, who happens to have some left-over materials from a previous job, then gets shoddy work or no work at all.

“Let’s share this found cash” Stranger approaches elder with offer to share “found” cash. Elder is told to get “good faith money” of their own, which is then stolen by deception.

Verification Scam: Victim receives a telephone call requesting verification of either credit card number or social

security number. This information is then used for fraudulent purposes.

“You hit my car in the parking lot!” Crooks smear elder’s parked car with tar while elder is shopping. When elder returns and drives off, crooks follow, and accuse elder of Hit & Run, pointing to tar as evidence of “damage.” Crooks demand cash to keep from calling police.

“Latin-Lotto” Scam: “Illegal alien” offers the elder a share of their “winning” lottery ticket-if the elder is willing to put up their own cash to help redeem it.

Gold Bar or Diamond Scam: “Foreigner” offers to sell elder a fake gold bar or diamond at a “big discount” to raise cash for a “family emergency” back home.

Utility Inspector Scam: Phony “Utility Inspector” comes to elder’s home, distracts elder while the house is burglarized.

Bank Examiner Scam: Elder gets phone call asking the elder to give a cash deposit to a “bank detective” trying to catch a crooked teller at the elder’s bank.

The old saying of “if it sounds too good to be true then it probably is” is good advice. Always check with a family member or friend before getting involved in any business that asks you to send money.

For more information on elder abuse and what to watch out for please visit www.scamnot.org, a website dedicated to the education and prevention of elder abuse.

—Cory Scholtes
*Direct Services Supervisor
 Fresno-Madera Area Agency on Aging*

2-1-1 San Diego receives AIRS Accreditation

“Pass with highest honors.” With these words, 2-1-1 San Diego, was acknowledged at the Alliance of Information and Referral (AIRS) Annual Meeting May 9 in Jacksonville, Florida, for successful attainment of AIRS accreditation. San Diego 2-1-1 is the second AIRS accredited agency in California, joining Los Angeles 2-1-1 which was the first in the nation and has recently received re-accreditation. There are over 70 accredited agencies across the US and Canada.

Accreditation determines whether an organization meets the AIRS Standards for Professional Information and Referral through a comprehensive analysis of the agency’s policies and practices culminating in a site visit. Sara Matta, the Executive Director of 2-1-1 San Diego estimates it took the equivalent of two staff years to prepare for the accreditation process. “It is well worth it”, she said.

In written comments that supported the AIRS award, a reviewer noted that “San Diego 2-1-1 is the best prepared site I have visited.” In particular, 2-1-1 was recognized for a number of “best practices,” including the “AIRS Jeopardy” game developed to familiarize staff with AIRS standards and the quarterly report to the Board reflecting progress related to identified goals or Critical Success Indicators

(CSIs). A number of the San Diego 2-1-1 tools and procedures have been posted on the AIRS website as Best Practices.



Sara Matta, 2-1-1 San Diego Executive Director (center) with Micki Thompson and Beth Pline, AIRS Reviewers.

CAIRS Annual Conference

The California Endowment Center for Healthy Communities was a great setting for CAIRS 2007 Annual Conference, "Taking I&R to the Next Level." The Los Angeles facility proved to be an innovative venue for this year's conference, offering the latest in technology and media equipment for each workshop.

The conference site provided an open, inviting and contemporary multipurpose facility that complements this historic, culturally diverse area of the city. Throughout the center there were works of renowned California artists that were commissioned as part of the public art program. The center was created by the award-winning Los Angeles architecture firm Rios Clementi Hale Studios.

The event attracted over 75 people from all parts of the state. Networking, meeting new people and exchanging business cards was ongoing throughout the day.

As the field of Information and Referral continues to grow and adds more 2-1-1 Call Centers to their list, this year's theme focused on a variety of different areas needed to enhance I&R services. Half day workshops were provided on call management tracking, disaster preparedness, senior disabled, cultural diversity and self care for the I&R service center specialist.

Many I&R systems are now upgrading phone and computer systems. Along with these systems come reporting and metrics systems. **Steve Collins** presented a dynamic workshop on Call Management and Tracking. It was great to see **Burt Wallrich** again, as he presented the Disaster Preparedness and Response workshop with **Bill Norris**, 211 San Diego. Each of these workshops was overflowing with attendees. **Cory Scholtes** presented the workshop on Senior Disabled Information and Referral. As our population ages, more seniors and those with disabilities are seeking services. This workshop focused on changes in health, providing family support to aging caregivers and approaches for planning for the future. With growing and expanding of I&R services and Call Centers, Call Specialists are always in the role of the being a caregiver. Strategies were presented in the afternoon workshop of self care and relaxation. The "6 Second Pause" was one of the tools provided. To give yourself a break during the day, make a list of six things that relax you, whether places to go, songs, movies, etc. When you're feeling stressed or overwhelmed, take the list out, think about those things, hear the songs, or visualize the place you would like to be. You will feel refreshed.



Roberto Almanzan,
Keynote
Speaker

Roberto Almanzan delivered a passionate keynote on working with diverse groups and enhancing cultural competency skills. He gave a history of his background and how hard he worked to get into Stanford University. The audience laughed as Roberto shared how his dress style of East LA didn't quite fit into Stanford's setting. He also provided a well attended full day workshop on Cultural Competency Skills.

Jim Fowler from San Jose, a singer and song writer amazed us with the 2-1-1 song. Jim wrote this song a few years ago when 2-1-1 was first being discussed in California. The song depicts the everyday life of a person in need. calling 2-1-1. One verse describes how the I&R specialist is there to listen, to be empathetic, to be compassionate and connect the person with the needed services. One of the verses he sang was, "Nationwide and in your neighborhood too. 2-1-1 is there for you."

Sara Matta, Executive Director of 211 San Diego was recognized by CAIRS with a plaque for her outstanding work in the I&R field over the last twenty years. During that time Sara has managed 211 San Diego and was the Planning Director for United Way of Los Angeles in the late seventies. She was instrumental in creating INFO LINE of Los Angeles. Earlier Sara contributed to building the system of child care resource and referral services throughout California. She served on the CAIRS Board in the late eighties and returned to the board in 2003. Additionally, Sara served on the AIRS Board for eight years. She was on the AIRS/United Way of America Council that guided the planning for 2-1-1 Initiative nationwide. She served as last year's CAIRS Board President. Sara has been a critical player in bringing 2-1-1 to California, being on the 2-1-1 Leadership Team, working on the state legislative measures and getting the cell phone companies on board to offer 2-1-1 service.

At this year's conference, over 30 people took the AIRS Certification Testing.

We look forward to next year's conference in Northern California. Remember to log onto the AIRS website at www.airs.org for ongoing online training.

—Elaine Martinez Curry



Conference Registration

MORE CONFERENCE PHOTOS



Sara Matta and Maribel Marin
with CAIRS Award given to Sara



Jim Fowler, Singer/Songwriter

2-1-1 across all California - It will happen!

2-1-1 California, the Partnership which developed the State-wide Business Plan for bringing 2-1-1 to all of California by 2010 is alive and well and has broadened in its reach and support for the statewide system. The original partners were CAIRS and the United Ways of California. Over the last year the Volunteer Centers of California have joined the Partnership and two State agencies — the State Office of Emergency Services and California Volunteers (previously the Governor's Office of Service and Volunteerism) — are working with us to make the Business Plan a reality.

We hope to announce soon the funding of a Technology Plan which will be one of the first steps — enabling existing 2-1-1's to work together and provide statewide response in the event of disaster. At the same time 2-1-1 California is raising funds in the private sector to further other goals of the plan.

Regional Meetings

2-1-1 California plans to hold regional meetings over the summer to re-connect with interested individuals in areas where 2-1-1 is not yet close to reality. Watch the CAIRS website for information on when and where these will be held, or if you are interested in additional information, contact Elaine Martinez Curry at curryelm@verizon.net or 805-217-5994.

AIRS/CAIRS Training

AIRS/CAIRS members can access valuable information and referral training on-line. AIRS has partnered with CEQuick, a service of Essential Learning, to provide state-of-the-art training modules for members. Essential Learning is the registered provider for state and national accreditations in the health and human services sectors.

All members will be able to access the training, but members at the Enhanced and Premium levels will receive a 10% discount on the cost of each training module. AIRS has developed five modules to kick-off the on-line training. These are: Introduction to I&R; Overview for the Resource Specialist; The I&R Process (from contact to closure); Introduction to Taxonomy and Indexing; and Handling Challenging Clients. While the entire array of CEQuick training modules are available to AIRS/CAIRS members, AIRS has identified 19 of the current modules that are particularly relevant to I&R.

Most of the courses cost from \$15 to \$40 depending on their length. You can check out the offerings at www.cequick.com/airs.

AIRS/CAIRS Membership

A single integrated membership structure provides automatic membership for both AIRS and CAIRS. Please strongly consider joining or renewing at the Enhanced or Premium Level. Member agencies at the Enhanced and Premium levels receive a free update of the 400-page ABC's of I&R (separately priced at \$450 but included in Enhanced or Premium level membership). This new version includes revisions to the existing material, as well as additional test questions on all subject areas and two new sections on I&R in disasters. If you are an AIRS/CAIRS member and have not received any of the benefits at your particular membership level, please email AIRS Membership Director, Moayad Zahralddin at moayadzahyalddin@airs.org.

For 2007, there are again four membership levels – Basic (\$50), Standard (\$250 for agencies < \$75,000; \$350 for agencies > \$75,000), Enhanced (\$500) and Premium (\$750). For a full detailed description of CAIRS and AIRS membership benefits at each level, please visit the CAIRS website at www.caIRS.org.

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Become a California Leader in the Information and Referral Field. Explore Joining the CAIRS Board!

CAIRS is looking for new leadership, new ideas and fresh energy on the Board.

Like any other professional association CAIRS does not run itself. It takes the leadership, hard work and cooperation of its members to simply survive, much less flourish, prosper and succeed. Because we do not have paid staff, it has taken the participation, planning and implementation efforts of Board members and other individual CAIRS members for our conferences, training, newsletters and advocacy to succeed.

Right now, making 2-1-1 a reality in every California community is our priority! This is a remarkable opportunity and challenge to us as the premier Information and Referral organization in the State. This is the moment for increased involvement from more of you in the field.

The CAIRS Board is the planning and executive arm of the organization. Board members communicate with each other and meet regularly to carry out the workplan. The Board sets policy and tends to the legal requirements of the corporation as well as communicates with members, designs the programs and carries them out.

We are currently conducting a review of the By Laws Board provisions which currently call for 16 seats, of which 4 to 6 are open for election each year. Current terms of office are three years.

Continued on next page



Vision Statement

A strong network of organizations that ensures everyone can easily access high quality information and referral for health and human services.

Mission Statement

To enhance the effectiveness of Information and Referral services through leadership, education and support.

Goals

In order to achieve the Mission and Vision, the following Goals have been established:

To *provide* training and support to enhance professional skills;

To *facilitate* the exchange of information among the membership and others within the helping professions;

To *promote* awareness of Information and Referral services;

To *advocate* for the interests of the profession and the public it serves.

STATEMENT OF CAIRS FINANCIAL ACTIVITIES For the year ending December 31, 2006

Income

Membership	\$ 5,308.00
Interest	\$ 967.04
Sales	\$ 207.00
Conferences	\$17,410.00
Other	\$ 3,474.28
Total Unrestricted Fund Income	\$27,366.52

Total Restricted Fund Income	\$ 0.00
TOTAL INCOME	\$27,366.52

Expenditures

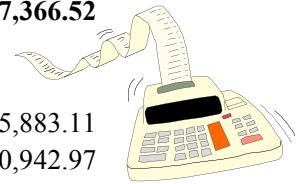
Board Expenditures	\$ 5,883.11
Conferences	\$10,942.97
Insurance	\$ 2,996.00
AIRS/CAIRS Liaison	\$ 704.42
Public Relations	\$ 404.10
Newsletter	\$ 1,651.55
Bank Charges	\$ 120.00
Taxes	\$ 40.00
Miscellaneous	\$ 0.00
Consulting Services	\$ 0.00
Total Unrestricted Fund Expense	\$24,867.15

Total Restricted Fund Expense	\$ 0.00
TOTAL EXPENDITURES	\$24,867.15

Carryover from 2005	\$35,524.43
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CAIRS Unrestricted Fund Balance	\$37,903.80
Petty Cash	\$ 110.00
CAIRS Restricted Funds*	\$ 1,181.58
Total Funds as of 12/31/06	\$39,195.38

*Restricted Funds. These funds were donated to CAIRS for specific uses and may not be used for the general activities of CAIRS.



Board (continued from Page 7)

CAIRS is looking for individuals who are dedicated to the Information and Referral field to assist with managing and carrying out the work of:

- Bringing 2-1-1 to new communities.
- Acquiring the resources for a statewide system.
- Planning and providing training opportunities for I&R professionals, managers and leaders.
- Networking with new and prospective 2-1-1 organizations.
- Planning public policy initiatives at the local, state and national levels.

- Contacting policymakers to build support.

Board membership requires regular attendance at Board meetings and CAIRS-sponsored events as well as involvement between Board meetings on committee and workplan assignments.

If you are interested in being on the Board or would like to nominate someone, please send the appropriate information to Ed Schoenberger, Nominations Committee, CAIRS at eschoenberger@uwba.org.

Write *CAIRS BOARD* in the subject line.

—Ed Schoenberger
United Way of the Bay Area