

## Minutes – CAREAPP Learning Network Session

January 17; 11:00AM – 12:00PM  
 Barton Conference Room

### Network Partners Present:

Leslie Adams, HC Health Department  
 Shereen Cabrera-Bentley, HC Health Department  
 LaShawn Cager-Brown, DCRS  
 Monica Castillo-Cruz, HC Health Department  
 Christina Castro, HC Department of Fire and Rescue  
 Tracy Deik, HC Housing & Community Development  
 Eunise Foster, DCRS  
 Tiffany Holtzman, S.A.F.E. Food Pantry  
 Caitlyn Kibler, Chase Brexton

Aliyah King, HC Health Department  
 Tricia Longo, HC Health Department  
 Paul McElderry, CAC  
 Renee McElroy, MakingChange  
 Jenna Mermer, HC Health Department  
 Chris Moore, HC DCRS  
 Sashani Simpson, HCGH  
 Holly Waddell, Neighbor Ride  
 Kristy Wheelton, Humanim

### Staff Present:

Natalie Hall, CAREAPP Coordinate Lead Liaison  
 Vanda Lerdboon, CAREAPP Program Manager

| Topic/Agenda                                | Discussion                                                                                                                                                                                                                                                                                                                | Action/Follow-up                                                                                                                                                                                                                                                |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Welcome and Introductions</b>            | Natalie Hall called the meeting to order at 11:00 AM.                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                 |
| <b>CAREAPP User Engagement</b>              | Natalie Hall referred to PPT slides.<br><br><b>At the end of FY20 Q2, 17,536 searches were conducted, and 3,625 referrals were created.</b>                                                                                                                                                                               | Increase the number of searches by adding more client facing locations in the community. Click <a href="#">here</a> to view the list of potential client facing locations identified by Learning Network attendees during a small group brainstorming activity. |
| <b>CAREAPP Reports and Platform Updates</b> | Platform Enhancements:<br>1. Coordinate users to <i>assign referrals to any user within their company</i> (that has access to the client for which the referral was made).<br>a. Previously, a user could only assign a referral to a user that is on their team (even if that user already has access to that referral). | <b>Platform Enhancements:</b><br><b>Assign Referrals:</b> Click <a href="#">here</a> for data dictionary                                                                                                                                                        |

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|                                                 | <ol style="list-style-type: none"> <li>2. Introduced an automated search category detection solution that applies a single category to a search based on keywords, service offerings, and program popularity. <ol style="list-style-type: none"> <li>a. For example, it is now possible to categorize:</li> <li>b. Free text searches with no filters</li> <li>c. Branded searches, such as “Catholic Charities”</li> <li>d. These two types of searches will now be separated into one of Healthify’s 13 categories.</li> </ol> </li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                               |
| <p><b>CAREAPP Network Partner Spotlight</b></p> | <p><b>Renee McElroy</b>, from <b><i>MakingChange</i></b> presented information about their services.</p> <ol style="list-style-type: none"> <li>1. Group Seminars <ul style="list-style-type: none"> <li>▪ Our seminars cover a broad range of topics including: budgeting, understanding credit, dealing with debt and understanding debt collection, fraud and scams, managing student loans, as well as savings and investment.</li> </ul> </li> <li>2. Free Tax Preparation <ul style="list-style-type: none"> <li>▪ MakingChange hosts Howard County’s free VITA (Volunteer Income Tax Assistance) site at the MultiService Center located in Laurel. VITA offers free tax preparation assistance to most individual taxpayers who earn less than \$54,000 and to small sole proprietor business with claimed deductions less than \$10,00. Sole Proprietors must use form C-EZ</li> </ul> </li> <li>3. Housing Counseling <ul style="list-style-type: none"> <li>▪ MakingChange offers a broad range of services to their clients to support their goals related to 1<sup>st</sup>-time homeownership. This includes 1<sup>st</sup>-time homeowner workshops as well as 1:1 housing counseling.</li> </ul> </li> <li>4. Personal Financial Coaching <ul style="list-style-type: none"> <li>▪ Our individual coaching sessions help individuals track monthly expenses, develop personal spending plans,</li> </ul> </li> </ol> | <p>Click <a href="#">here</a> to send a referral to <b>MakingChange</b><br/> Click <a href="#">here</a> to send a referral to <b>S.A.F.E. Food Pantry</b></p> |

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|                                                   | <p>create a strategy to pay down debt, set financial goals and create plans for self-sufficiency and success. Sessions typically last about an hour.</p> <p><b>Tiffany Holtzman</b>, from <i>Supplying Allergy Friendly and Emergency (S.A.F.E.) Food Pantry</i> presented information about their services.</p> <p><i>Mission Statement:</i> Educate, inspire, and engage the community about the necessity for gluten free and allergy-friendly food and provide that safe food to those in need.</p> <ol style="list-style-type: none"> <li>1. S.A.F.E. works in partnership with the largest food distributor in county</li> <li>2. S.A.F.E. also works in conjunction with other local nonprofit organizations to help their clients</li> <li>3. S.A.F.E. now serves clients directly through the Emergency Food Pantry</li> </ol> <p><b>PPT posted on the website.</b></p> |                                                                                                                                                                                                                                                                                                                                                                                  |
| <p><b>Open Discussion &amp; Announcements</b></p> | <p>Natalie reviewed action items for all Team Admins and Coordinate Leads.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <ol style="list-style-type: none"> <li>1. Consider setting up a search lab for clients at your organization</li> <li>2. Monitor and ensure timely referral status updates</li> <li>3. Mid-Year User Clean-Up (send Natalie a list of CAREAPP users that need to be added/deleted)</li> <li>4. Review and update resource page Quarterly (December, March, &amp; June)</li> </ol> |
| <p><b>Adjournment</b></p>                         | <p>The session was adjourned at 12:00 PM.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                  |

**Future Meeting Dates:**

March 20, 2020 from 11:00AM – 12:00PM