

# 2021

## CAPLAW Virtual Training Conference

June 29 - July 1, 2021



Join us in the cloud for the **2021 CAPLAW National Training Conference** from **June 29 - July 1, 2021!** With expert knowledge in their fields, our results-oriented faculty will help you navigate the challenges that Community Action Agencies, other federally-funded organizations, and nonprofits encounter each day during the pandemic, and beyond. Choose from a full line-up of workshops addressing current governance, human resources, financial, sustainability, and program topics.

### Conference At-A-Glance

#### Tuesday, June 29, 2021

9:45 am - 10:45 am

**Opening Session**

11:00 am - 12:15 pm

**Workshop Session One**

1A. Governance: ABCs of CAA Bylaws

1B. HR: Is Your Employee Handbook a Friend or Foe?

1C. Financial: Do Those Costs Add Up? Maximizing Administrative Cost Recovery Under Multiple Funding Sources

1D. Program: Head Start Update

1:00 pm - 2:15 pm

**Workshop Session Two**

2A. Governance: Structuring a High-Performance Board: Strategies for Board Committees

2B. HR: Confronting and Overcoming Unconscious Bias for Compliance and Culture: Real Talk about Real Issues

2C. Financial: Ask the Financial Experts!

2D. Program: CSBG Hot Topics

2:30 pm - 3:15 pm

**Networking Session**

#### Wednesday, June 30, 2021

10:00 am - 10:45 am

**Federal Partners Meet and Greet**

11:00 am - 12:15 pm

**Workshop Session Three**

3A. Governance: Knowledge Nuggets to Make Your Board the Gold Standard

3B. HR: A Legal and Psychological Primer on Workplace Stress and Burnout

3C. Financial: Finance Function Dysfunction: Assessing and Improving Your Financial Operations

3D. Sustainability: Rules of Engagement: Mastering Advocacy and Lobbying

12:30 pm - 1:00 pm

**Legislative Update**

1:45 pm - 3:00 pm

**Workshop Session Four**

4A. Governance: Learning Your 123s: Financial Literacy for Board Members

4B. HR: Don't Get Lost in the Weeds: The Latest on Marijuana and its Influence on the Workplace

4C. Financial: Strategic Audit Preparation - Perspectives and Lessons Learned

4D. Sustainability: Teaming Up to do More: Collaborating Through Shared Services

3:15 pm - 4:30 pm

### **Workshop Session Five**

5A. Governance: Essential Elements of an Effective ED-Board Relationship

5B. HR: FLSA Check-up

5C. Financial: The Budget Crystal Ball: Financial Forecasting in Uncertain Times

5D. Sustainability: Joining Forces for Affordable Housing

## **Thursday, July 1, 2021**

10:00 am - 10:45 am

### **CAPLAW Café**

11:00 am - 12:15 pm

### **Workshop Session Six**

6A. Governance: Centering Board Leadership and Engagement in Equity

6B. HR: Handle with Care: Bad Apples and Your Workplace

6C. Financial: Finance & Friends: The Relationship Between Finance and Program Managers

6D. Sustainability: Stalls, Plateaus, and Sputters: How to Reinvigorate Your Fundraising Program and Get Moving Again

12:30 pm - 1:15 pm

### **Closing Session**

## **Workshops**

### **Tuesday, June 29, 2021**

9:45 am - 10:45 am

### **Opening Session**

More details are forthcoming!

11:00 am - 12:15 pm

### **Workshop Session One**

#### **1A. Governance: ABCs of CAA Bylaws**

Clear, authoritative, and up-to-date bylaws are a cornerstone of good governance. The CSBG Organizational Standards emphasize the importance of bylaws and the integral role that an attorney plays in ensuring that the bylaws of a Community Action Agency (CAA) are up to par. In this session, we will discuss the laws specifically applicable to a CAA's bylaws and what provisions the bylaws must contain to ensure compliance with key requirements of those laws. Differences in requirements and recommendations for public versus private non-profit CAAs will be noted. We will discuss how to comply with CSBG and Head Start board composition and selection requirements and answer questions such as: How do a CAA's bylaws relate to its articles of incorporation, board resolutions and organization-wide policies? What provisions should (and shouldn't) be included in CAA bylaws? How should CAA bylaws address issues such as board size, terms and term limits, and meeting procedures (especially where it is difficult for the board to meet in person)?

**Presenter:** Eleanor Evans, Esq., Hemenway & Barnes LLP

#### **1B. HR: Is Your Employee Handbook a Friend or Foe?**

Maintaining a well-written, legally-compliant, and up-to-date employee handbook is more important than ever, especially in light of changes in operations due to the pandemic and the CSBG Organizational Standards' directive that they be reviewed by an attorney and approved by the board at least every five years. Handbooks should be drafted to let your employees know what is expected of them and what they can expect from you. Out-of-date and well-intended but poorly written policies tend to create legal risks and unintended obligations for employers. Moreover, policies related to leaves, credit checks, harassment and discrimination, criminal background information, and medical tests that may have been appropriate when written may now be subject to challenges in court and by various government agencies. This session will highlight key policies to include in your employee handbooks and issues to consider when reviewing and updating your handbook.

**Presenter:** Andria Ryan, Esq., Fisher Phillips LLP

### 1C. Financial: Do Those Costs Add Up? Maximizing Administrative Cost Recovery Under Multiple Funding Sources

Take a deeper look at whether your Community Action Agency (CAA) is fully recovering its administrative costs in a complex, multi-funding source environment. Explore whether your current approach—use of an indirect cost rate, the 10% de minimis rate, or a cost allocation plan to directly charge agency-wide administrative costs to multiple agreements—is fully covering your costs without consuming unreasonable time and energy. Learn how CAAs are developing agency-wide strategies that meet distinct needs of governmental funding, private support, and earned income ventures. We will discuss issues that plague cost recovery, such as working with indirect cost rates in a mixed funding environment, managing multiple administrative cost limits, treating costs consistently, fully recovering administrative costs, and adopting a consistent approach as funding awards grow and shrink.

**Presenter:** Kay Sohl, Kay Sohl Consulting

### 1D. Program: Head Start Update

Be sure you're up to speed on the latest developments affecting your organization's Head Start program. This session will feature a spirited discussion of topics such as: Office of Head Start's (OHS) program planning efforts for years 2021/2022; impacts of COVID-19 funding; current status of OHS and Center for Disease Control (CDC) guidance; monitoring takeaways; center based duration requirements; equity and inclusion efforts; the National Head Start Association's policy agenda; recent U.S. Department of Health and Human Services Departmental Appeals Board decisions affecting Head Start grantees and more.

**Presenters:** Ann Linehan, MEd, Federal Office of Head Start; R. Brian Tipton, Esq., The Private Client Law Group; Yasmina Vinci, National Head Start Association

1:00 pm - 2:15 pm

## Workshop Session Two

### 2A. Governance: Structuring a High-Performance Board: Strategies for Board Committees

The wide-ranging responsibilities of a Community Action Agency (CAA) board of directors often mean that it's not possible for everything to be accomplished at board meetings. Committees can be a powerful and effective tool for maximizing effectiveness of the organization and best utilizing the skills and strengths of directors and other volunteers. Join us for a workshop that will help you gain a clearer understanding of a high-performing board structure, as well as strategies for developing and supporting effective committee operations that align with the organization's bylaws and other legal requirements. We will discuss the roles and responsibilities of the most common CAA board standing committees—executive, governance, finance/audit, and personnel committees—as well as when to make use of ad hoc committees. Participants will learn the key considerations to working effectively through committees, developing committee charters that support good governance, and coordinating committee work with the actions of the full board.

**Presenter:** Erin Bradrick, Esq., NEO Law Group

### 2B. HR: Confronting and Overcoming Unconscious Bias for Compliance and Culture: Real Talk about Real Issues

In the wake of protests and highly visible conversations about race over the last year, many CAAs are focused on fostering an inclusive, productive environment where diversity is appreciated and embraced as a core principle, a sense of belonging is achieved, and leaders are given tools to implement diversity initiatives. This interactive session will help participants understand how confronting and understanding unconscious bias can help create such an environment. The discussion will include: 1) the importance of diversity; 2) the definition of unconscious bias, including awareness and exercises; 3) techniques and strategies to overcome bias; and 4) the definitions of Anti-Racism and Allyship; and 5) how an understanding of unconscious bias can help your agency comply with employment laws that relate to discrimination.

**Presenter:** Luther Wright, Jr., Esq., Ogletree Deakins

## 2C. Financial: Ask the Financial Experts!

Take a deep breath and a moment to finally explore those nagging financial questions that you always mean to ask but never do. This session will provide a unique opportunity to hear a panel of financial experts—a consultant, an auditor, and a CFO of a CAA, all with considerable experience—answer specific questions that CAPLAW and the experts regularly receive, along with questions from you and your peers. Topics may include: impacts of emergency funding on existing financial operations; managing cash flows; applicability of indirect cost rates to emergency and regular funding; and cost principles and allowability during a pandemic and beyond.

**Presenters:** Michelle Picklesimer, South Central Community Action Partnership, Inc.; Kay Sohl, Kay Sohl Consulting; Denes Tobie, CPA, Wipfli LLP

## 2D. Program: CSBG Hot Topics

Join us for a lively panel discussion of current Community Services Block Grant (CSBG) issues. Hear the latest on pandemic relief and vaccinations, CSBG reporting, equity and inclusion efforts, the Organizational Standards, and the results of the American Consumer Satisfaction Index (ACSI). Find out about CSBG network training and technical assistance (T/TA) initiatives and more!

**Presenters:** Jenae Bjelland, NCRT, National Association for State Community Services Programs; Denise Harlow, CCAP, NRCT, National Community Action Partnership; Charisse Johnson, Federal Office of Community Services

2:30 pm - 3:15 pm

### Networking Session

More details are forthcoming!

## Wednesday, June 30, 2021

10:00 am - 10:45 am

### Federal Partners Meet and Greet

More details are forthcoming!

11:00 am - 12:15 pm

### Workshop Session Three

#### 3A. Governance: Knowledge Nuggets to Make Your Board the Gold Standard

Does your board operate effectively and efficiently? Do you know what is required of you as a Community Action Board Member? Service on a board can be an experience that is greatly satisfying or plagued with frustration. Leaders and governing body members must know specific requirements, and should consider processes to keep board members engaged. This session will include 'knowledge nuggets' that must not be missed with questions that should always be asked. From onboarding new members through meeting practices, participants will be provided with an overview of roles and responsibilities incorporating CSBG Organizational Standards and Head Start Performance Standards. Board members will come away understanding the significance and value of their service.

**Presenters:** Tai Blythe, CCAP and Bertha Proctor, EdD, CCAP, WiseCAP Training and Consulting

#### 3B. HR: A Legal and Psychological Primer on Workplace Stress and Burnout

Employee stress can have a tremendous impact on the workplace, particularly at mission-driven organizations dedicated to serving client and community interests. Join a clinical psychologist and an employment attorney to examine the psychological and legal issues raised by workplace stress, and to develop a plan of intervention for employees experiencing burnout. We will explore the causes and impact of stress—from decreased productivity to increased on-the-job accidents and higher employee turnover. We will also discuss how to handle stress-related leave and accommodation requests under the FMLA and ADA, as well as managing potential liabilities for workplace claims and mistakes caused by overworked employees. This session offers techniques that every manager can use to prevent and address stress and burnout in your workplace.

**Presenters:** Andrea Elkon, PhD, Alliance Spine and Pain Centers; Michael Elkon, Esq., Fisher Phillips LLP

### 3C. Financial: Finance Function Dysfunction: Assessing and Improving Your Financial Operations

Turnover. Questionable internal controls. Bad data. Slow and manual processes. Scads of Excel schedules. Late financials, or none at all. Do any of these sound familiar? Often these pain points are really symptoms of deeper challenges within an organization's finance function. In this session, learn about a holistic approach you can take to assess the processes, controls, systems, and structure your finance function uses to operate, and how to develop a road-map to get you from today's challenges to the high-performing finance function of your future.

**Presenters:** Ashley Barsema, CPA, and James Thomas, JD, CPA, CliftonLarsonAllen LLP

### 3D. Sustainability: Rules of Engagement: Mastering Advocacy and Lobbying

In today's political climate, many CAAs are focusing efforts and resources on advocacy and lobbying activities. It is critical to review the relevant rules so that you don't jeopardize your funding or tax-exempt status by raising your voice. This seminar will review Federal tax laws pertinent to 501(c)(3) tax exempt organizations with a focus on the ways CAAs can be active during an election year. It will explain the differences between advocacy, lobbying, and electioneering and will clarify the extent to which CAAs can engage in such activities.

**Presenter:** Teresa M. Santalucia, Esq., Klein Hornig LLP

12:30 pm - 1:00 pm

### Legislative Update

**Presenter:** David Bradley, National Community Action Foundation

1:45 pm - 3:00 pm

### Workshop Session Four

#### 4A. Governance: Learning Your 123s: Financial Literacy for Board Members

CAA board service carries with it a responsibility to oversee the financial health of the organization. At times, board members undertake that responsibility ill-prepared or unfamiliar with the ins and outs of financial statements and balance sheets. This workshop is designed to familiarize CAA board members with the financial information encountered during board service. It will include practical peeks at financial statements and balance sheets, with the goal of educating board members about how to read the numbers and what they mean for the CAA's financial status.

**Presenter:** Keith Hundley, CPA, Carr, Riggs, & Ingram

#### 4B. HR: Don't Get Lost in the Weeds: The Latest on Marijuana and its Influence on the Workplace

The proliferation of medical and recreational marijuana laws and the shift to remote work due to the pandemic continue to create a complex blend of issues for employers seeking to maintain drug-free and safe workplaces. Is cannabidiol ("CBD") considered marijuana for drug testing purposes? Should employers test for marijuana at the hiring stage? How can employers determine whether there is reasonable suspicion to drug test an employee? Do employers have to engage in an interactive process with, and accommodate, medical marijuana users? In this interactive session, we will untangle and cut through the weeds to answer attendees' pressing questions about the lawful use of marijuana and its influence on the workplace.

**Presenter:** James Paul, Esq., Ogletree Deakins

#### 4C. Financial: Strategic Audit Preparation - Perspectives and Lessons Learned

The influx of federal funds into the Community Action network, while welcome, comes with an added layer of oversight and accountability. Audits of pandemic-related funding will soon be in full swing so now is the time to reflect on lessons learned to date. In this session we will discuss the audit implications triggered by the increase in funding and key aspects to consider for compliance. We will explore steps community action agencies can take now to help position themselves for an effective and smooth audit process.

**Presenter:** Rebecca Field, CPA, CISA, CRISC, CICA, CliftonLarsonAllen LLP

#### **4D. Sustainability: Teaming Up to do More: Collaborating Through Shared Services**

In the face of government funding cuts and increased competition for limited resources, many CAAs are exploring shared services to improve their sustainability and enhance their efficiency and effectiveness. CAAs can structure these arrangements with one or more other organizations to share administrative or programmatic functions or physical resources. Sharing services can also be a first step towards pursuing closer collaborations, including mergers, with potential community partners. In this session, we will discuss the various options for sharing services; the financial, legal, and government grant law issues involved; and sample provisions CAAs should consider in negotiating a shared services agreement.

**Presenters:** Eleanor Evans, Esq., Hemenway & Barnes LLP; Dawn Hommer, MBA, CCAP, Community Action Agency of Southern New Mexico

3:15 pm - 4:30 pm

#### **Workshop Session Five**

##### **5A. Governance: Essential Elements of an Effective ED-Board Relationship**

The relationship between the Executive Director and the board of a Community Action Agency (CAA) can make or break the organization. In this session, a nonprofit law attorney with extensive experience advising CAAs will participate in a conversation with seasoned CAA Executive Directors and their respective board chairs to get at the heart of how to forge a strong partnership among the key leaders of the organization. Addressing questions solicited in advance from attendees, the panel will discuss specific challenges executive directors and board chairs have faced, gray areas of decision-making, the delineation of authority, the importance of establishing the roles of staff and board and how they work in practice, and ways to build the trust necessary to cultivate a positive and flexible working relationship.

**Presenters:** Anita Lichtblau, Esq., Casner & Edwards, LLP; Betsey Andrews Parker, Community Action Partnership of Stafford County; Ken Robinette and Rosanna Campbell, South Central Community Action Partnership, Inc.

##### **5B. HR: FLSA Check-up**

The (juris) doctor is in! With new overtime and joint employer rules in place, 2021 is a great time to review compliance with the Fair Labor Standards Act (FLSA). This session will use hypotheticals and case studies taken from your CAPLAW consultations to demonstrate how to analyze the FLSA questions that come up every day. Questions like: What does the new overtime rule mean for my organization? Who is exempt from overtime and minimum wage requirements? How does the FLSA relate to wage and hour laws in my state? How do I compute hours worked? What records do I need to keep?

**Presenter:** Rick Pins Esq., Stinson LLP

##### **5C. Financial: The Budget Crystal Ball: Financial Forecasting in Uncertain Times**

This session will help organizations leaders learn to use tools to manage finances in changing environments. In this session we will learn to take budgets to forecasts and use the forecast model to timely understand and react to data. Using this information, you can be proactive about making educated decisions to steer your organization to success.

**Presenter:** Denes Tobie, CPA, Wipfli LLP

##### **5D. Program: Joining Forces for Affordable Housing**

Community Action Agencies are well positioned to facilitate and promote the development of affordable housing. In this session geared towards nonprofit CAAs and public CAAs with nonprofit subsidiaries or affiliates, we will discuss what to consider as you assess how best to support your community's affordable housing goals. We will examine the roles CAAs can play in the development and preservation of affordable housing, and demonstrate how they can leverage their strengths and resources efficiently. We will highlight the pros and cons of participating in joint ventures to support affordable housing, including factors Boards should consider when exploring and participating in such opportunities.

**Presenter:** Teresa M. Santalucia, Esq., Klein Hornig LLP

Thursday, July 1, 2021

10:00 am - 10:45 am

**CAPLAW Café**

More details are forthcoming!

11:00 am - 12:15 pm

**Workshop Session Six**

**6A. Governance: Centering Board Leadership and Engagement in Equity**

Since its inception, a fundamental goal of the Community Action movement has been to provide members of each community with a voice in advancing poverty alleviating programs. Yet many CAA tripartite boards continue to experience challenges in achieving maximum participation across each sector of the board—public officials, low-income communities, and private organizations. This workshop focuses on the practices of boards that prioritize and promote inclusive governance. We will identify barriers that contribute to the alienation of board members and communities in organizational decision-making, examine strategies for tapping into the leadership potential of underrepresented groups, and discuss how to create a culture that fosters contributions from all stakeholders.

**Presenter:** Tiffney Marley, CCAP, NCRT, National Community Action Partnership

**6B. HR: Handle with Care: Bad Apples and Your Workplace**

It's an unfortunately familiar feeling for many professionals, HR and otherwise: that sinking sense of dread preceding an interaction with a difficult employee or coworker. This session will provide practical guidance on managing the negative impact of toxic individuals on your workplace. We'll review tactics for engaging with such individuals, motivating or disciplining them, and protecting your organization from liability. Using real world examples, we'll discuss how small changes in perspective and policy can end up saving you a big headache.

**Presenter:** Rick Pins, Esq., Stinson LLP

**6C. Financial: Finance & Friends: The Relationship Between Finance and Program Managers**

Program staff, have you ever asked, "Why is Finance asking for this now?" Finance managers, did you ever wonder why those program reports are delayed? Oftentimes for program managers, the work of their finance-focused colleagues is shrouded in mystery, and vice versa. A lack of understanding between finance and program departments can hinder effectiveness and efficiency, and pose potential problems for an organization. This workshop aims to increase understanding between finance and program staff eager to break down barriers and build better bonds that can enhance the work of the CAA.

**Presenter:** Keith Hundley, CPA, Carr, Riggs, & Ingram

**6D. Sustainability: Stalls, Plateaus, and Sputters: How to Reinvigorate Your Fundraising Program and Get Moving Again**

Many Community Action Agencies rely on private giving to fund innovative approaches that help meet client needs. And all programs, whether they are in their 1st year or their 20th, occasionally hit a bump in the road. Things can slow and stall for a variety of reasons. In this session, we will share real-life examples of reinvigorating stalled Community Action fundraising programs. We will explore the most effective ways to turn around a stalled program, or break through a plateau, how to re-engage a skeptical board, and how to build the kind of deep, meaningful relationships with donors that produce results not just for today, but for the long-term. Uncover commonly held myths that threaten to lead you and your board down a less productive path, discover the key metrics that indicate you are on the right track, and learn how to create the "magic" of private philanthropy by connecting with the caring donors who are ready to help you create hope, help and change for your clients.

**Presenter:** Catherine Crooker, Crooker Consulting

12:30 pm - 1:15 pm

**Closing Session**

More details are forthcoming!

## Speakers

### Ashley Barsema, CPA

#### CliftonLarsonAllen LLP

Ashley is a Nonprofit Director with CliftonLarsonAllen LLP (CLA) and has 13 years of experience with CLA and is heavily involved in training younger members of the Chicagoland team. She has significant experience working with nonprofits including: social service organizations with federal, state and local government compliance; associations; and foundations. She manages and supervises staff on nonprofit assurance, tax and consulting engagements. She is a member of the American Institute of Certified Public Accountants (AICPA) and Illinois Certified Public Accountants (ICPA) Society. Ashley received her master of accounting science and a bachelor of science in accountancy from Northern Illinois University.

### Jenae Bjelland, NCRT

#### National Association for State Community Services Programs

Jenae is the Executive Director of the National Association for State Community Services Programs (NASCSPP). Prior to accepting the position of Executive Director, she was the Director of Healthy Homes for NASCSPP and previously the Director of Research for NASCSPP. Jenae brings twenty years of experience in the anti-poverty and energy efficiency network, working at the local, state and national level. She is results driven, adept in analyzing process management, data, and technology needs, and is certified as a National Results Oriented Management and Accountability (ROMA) trainer.

### Tai Blythe, CCAP

#### WiseCAP Training and Consulting, Pace Community Action Agency

As Pace Community Action Agency's Associate Director, Tai handles agency communications, using technology to streamline processes at her CAA. She also works within the Head Start and Early Head Start Programs. In the past, she has been an adjunct university professor, an ERSEA Specialist and a Program Coordinator. In 2015, Tai was named one of the top 50 Exceptional Emerging Leaders in Early Childhood Education in the United States. She has worked with a variety of non-profit organizations and Fortune 500 companies to develop employee wellness and workplace safety initiatives, as well as smoking cessation and parenting classes. Efficiency and compliance are her specialties. Tai has a Master's in Leadership Development and a Bachelor's in Psychology with a minor in Sociology.

### David Bradley

#### National Community Action Foundation

For more than 30 years, David has been one of Washington's leading advocates on behalf of low-income programs. In 1981, David helped found the National Community Action Foundation (NCAF). As a private nonprofit organization funded solely by non-governmental contributions, NCAF represents funding and policy interests of the nation's 1,000 Community Action Agencies before Congress and the Executive Branch. In this role at NCAF, David was the primary architect of the Community Services Block Grant (CSBG) Act. Besides the CSBG, David's legislative activities include Weatherization Assistance, the Low Income Home Energy Assistance Program, Head Start, and job training programs. In an age in which partisan gridlock is too often the norm, David has shown an uncanny ability to make poverty issues a concern to both parties. After facing elimination in the 1995 House Republican's Contract with America, David was able to work with key House Republican leaders to ensure CSBG funding procured the largest percentage received of any domestic program in FY 1997. In his role at NCAF, David has also helped power CAPLAW and CAPPAC, a Political Action Committee. Prior to joining NCAF, David worked in Congressional Affairs at the Small Business Administration under President Jimmy Carter. He has bachelor's and master's degrees from George Washington University. In 1987, he was a Senior Executive Fellow at the John F. Kennedy School at Harvard University. David's mentor, Sargent Shriver, perhaps described David's advocacy best when he wrote "no one has done more to keep the War on Poverty fresh in the hearts and minds of individuals than David Bradley."

### Erin Bradrick, Esq.

#### NEO Law Group

Erin Bradrick is a Principal at NEO Law Group, where she provides corporate, governance, charitable trust, and tax counsel solely to nonprofits and exempt organizations. Erin is deeply committed to supporting and strengthening nonprofits and the sector at large. She is a regular contributor to publications such as the Nonprofit Law Blog, The Nonprofit Quarterly, Taxation of Exempts, The Chronicle of Philanthropy, and the American Bar Association's Business Law Today. She also frequently speaks on nonprofit legal issues and conducts trainings for nonprofit staffs on lobbying, advocacy, and election-related activities and for nonprofit Boards of Directors on a range of governance issues. Erin was recognized as the "2018 Outstanding Nonprofit Lawyer - Young Attorney" by the American Bar Association Nonprofit Organizations Committee. Prior to joining NEO Law Group, Erin was a litigator with Simpson Thacher & Bartlett LLP, and she also clerked for the Honorable Dana M. Sabraw in the United States District Court for the Southern District of California. Erin is a graduate of UCLA, summa cum laude in Women's Studies and Political Science, and Yale Law School, where she was Submissions Director and Symposium Coordinator of the Yale Journal of Law and Feminism.

**Rosanna Campbell****South Central Community Action Partnership, Inc.**

Rosanna Campbell serves as the Board Chair for South Central Community Action Partnership, Inc. (SCCAP). She became a board member for SSCAP in July of 2013 as representative of the Low-Income population for Twin Falls County. She has served on several sub committees of the SCCAP board, including Strategic Planning, Resource Development and Governance and regularly participates as a volunteer in SCCAP events such as the annual BBQ in the Park, Empty Bowls fundraisers, 60 hours to Fight Hunger and employee events. Prior to filling the role of board chair, she served as Secretary, Treasurer and Vice Chair. Rosanna also has an over 24-year career in Head Start that began with the Eastern Idaho Community Action Partnership (EICAP) Head Start program in Idaho Falls and Blackfoot. She has worked as a Parent Educator with the University of Idaho Parents as Teachers program and hosted Community Resource Fairs in Power County. After approximately 10 years with EICAP, she moved to the College of Southern Idaho (CIS) Head Start/Early Head Start program where she began as a Center Supervisor and currently serves as the Head Start Director. As a Head Start employee, Rosanna has helped guide families to SCCAP's resources, encouraged involvement by others in the community and promoted SCCAP with co-workers, staff and parents. She is passionate about children, families and supporting staff. She strongly believes that the work that both CIS and SCCAP do in the community, and for the community, makes a HUGE difference to so many in the Magic Valley. She is very happy to be a part of organizations, like SCCAP, that are focused on improving the lives of so many.

**Catherine Crooker****Crooker Consulting**

Catherine has served as a development and marketing leader since 1985, creating success for organizations large and small in multiple sectors. She excels at creating innovative strategies, and inspiring staff, volunteers, and boards to achieve audacious goals. Catherine has worked at organizations of all sizes, including Community Action of Washington County, Oregon, raising millions of dollars to help address issues of hunger and homelessness, find cures to cancer and heart disease, and educate our next generation of leaders. Much of her career was spent in higher education where she helped create successful annual and capital campaigns at organizations including the University of Portland, Pacific University, and Lewis & Clark College. Catherine's experience in large and small organizations lends her a unique set of skills. She is trained in the best practices of major gift fundraising inside large capital campaigns and uses her creative abilities to bring those vital tools to organizations with small staffs and limited budgets. Catherine is blessed to work with clients around the country. When not helping organizations achieve their fundraising dreams, she is probably hiking near her Sandwich, New Hampshire, home, or sitting at her spinning wheel with friends in Portland, Oregon.

**Andrea Elkon, PhD****Alliance Spine and Pain Centers**

Andrea is the Director of Behavioral Health for Alliance Spine and Pain Centers, a 19-office interventional pain management practice in the Atlanta Metro area. She has been a licensed psychologist in the state of Georgia for eleven years. Andrea specializes in Health Psychology and interventional pain management through an integrated mind/body approach. Andrea completed her Masters and Doctoral degrees at the University of Virginia. She received additional specialized clinical training in Columbia, South Carolina at the William S. Hall Psychiatric Institute, South Carolina Department of Mental Health, and University of South Carolina School of Medicine. Prior to joining Alliance Spine and Pain Centers, Andrea spent ten years working in public mental health at both the State and Federal levels. Andrea holds particular expertise in psychological assessment and has conducted thousands of examinations for State and Federal Courts, the Veterans Benefits Administration, correctional facilities, and private medical practices.

**Michael Elkon, Esq.****Fisher Phillips LLP**

Michael is a partner in the Atlanta office of the national employment law firm, Fisher Phillips. Michael advises clients and handles litigation regarding a bevy of employment laws, including Title VII, Section 1981, the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), the Family and Medical Leave Act (FMLA), Employee Retirement Income Security Act (ERISA), and state assault and battery laws. He specializes in providing advice and handling litigation relating to covenants not to compete, non-solicitation and non-disclosure provisions, employee raiding, trade secrets, the duty of loyalty, deceptive trade practices under state and federal law, the Computer Fraud & Abuse Act (CFAA), and state computer protection statutes. Michael is also a member of the firm's COVID-19 Taskforce, a cross-disciplinary team of attorneys dedicated to advising employers on the many workplace law aspects of the global coronavirus pandemic. In addition to litigating, Michael drafts restrictive covenants for numerous different types of agreements and counsels clients on protecting their confidential information and customer relationships, as well as recruiting talent. He received his undergraduate degree from the University of Michigan with High Distinction and his law degree from the University of Virginia School of Law.

**Eleanor Evans, Esq.****Hemenway & Barnes LLP**

Eleanor Evans is Counsel in the nonprofit practice at Hemenway & Barnes LLP. She has over 20 years' experience representing Community Action Agencies and other tax-exempt organizations in a diverse range of legal, governance and compliance matters. She provides practical advice on strategic initiatives and day-to-day operations in areas such as shared services and mergers,

bylaws, government grants and data privacy and security. Prior to joining Hemenway & Barnes, Eleanor served as Executive Director/General Counsel of Community Action Program Legal Services, Inc. (CAPLAW) and as General Counsel of Action for Boston Community Development, Inc. (ABCD), Boston's Community Action Agency. She is a graduate of Georgetown University Law Center and Smith College.

### **Rebecca Field, CPA, CISA, CRISC, CICA**

#### **CliftonLarsonAllen LLP**

Rebecca is a principal in the public sector group at CliftonLarsonAllen (CLA). She has over sixteen years of public accounting experience and working exclusively with nonprofit, higher education, and government organizations. She specializes in grant compliance, including policy and procedure development, as well as single audits, and has extensive knowledge in related regulations and requirements. Rebecca also serves as a firm wide assurance resource where she oversees compliance with professional standards, provides technical assistance, and assists with training curriculum. Rebecca serves on the finance committee of the board of directors for the Salvation Army and Ann Bancroft Foundation and as the finance committee chair for the Store to Door organization. She also serves on the steering committee of the Minnesota Business Ethics Awards and as a volunteer for Special Olympics of Minnesota, Junior Achievement, People Serving People, and Second Harvest Heartland, Alexandra House. She holds a BS in accounting as well as a BS in business administration and management of information systems from the University of Minnesota, Duluth.

### **Catherine Coleman Flowers**

#### **Center for Rural Enterprise and Environmental Justice**

Catherine Coleman Flowers is an internationally recognized environmental activist, MacArthur "genius" grant recipient, and author. She has dedicated her life's work to advocating for environmental justice, primarily equal access to clean water and functional sanitation for communities across the United States. Founder of the Center for Rural Enterprise and Environmental Justice (CREEJ), Flowers has spent her career promoting equal access to clean water, air, sanitation, and soil to reduce health and economic disparities in marginalized, rural communities. In addition, Flowers serves as Rural Development Manager for Bryan Stevenson's Equal Justice Initiative (EJI), is a Senior Fellow for the Center for Earth Ethics at Union Theological Seminary, and sits on the Board of Directors for the Climate Reality Project and the Natural Resources Defense Council. In 2021, her leadership and fervor in fighting for solutions to these issues led her to one of her most notable appointments yet — Vice Chair of the Biden Administration's inaugural White House Environmental Justice Advisory Council. As the author of *Waste: One Woman's Fight Against America's Dirty Secret*, Flowers shares her inspiring story of advocacy, from childhood to environmental justice champion. She discusses sanitation and its correlation with systemic class, racial, and geographic prejudice that affects people across the United States. She has been featured in *The New York Times*, *The Washington Post*, *Bloomberg*, *The Guardian*, and on PBS.

### **Denise Harlow, CCAP, NCRT**

#### **National Community Action Partnership**

Denise Harlow was named the Chief Executive Officer of the Community Action Partnership in December 2014. She has been with the Partnership since 2011 and served as Senior Director of Training and Technical Assistance and Interim Chief Operating Officer. Prior to her tenure at the Partnership, she was the CEO of the New York State Community Action Association and Sr. Vice President for Capacity Building for the New York Council of Nonprofits. Denise has more than 29 years of experience in the nonprofit sector, has served on several nonprofit boards of directors, and was an appointee to the Governor's Early Childhood Advisory Council in New York State. She started her Community Action career as a social worker with the Schenectady Community Action Program. She has a master's degree in Social Work from the University at Albany where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society, and holds a bachelor's degree in Social Work from Valparaiso University.

### **Dawn Hommer, MBA, CCAP**

#### **Community Action Agency of Southern New Mexico**

Dawn Z. Hommer is the Chief Executive Officer at the Community Action Agency of Southern New Mexico since 2011. Dawn is a Certified Community Action Professional and a graduate of the Paso Del Norte REALIZE leadership program. She serves on several Community Action Boards including as Chair of the New Mexico Association of Community Partners, Secretary for the Region VI Community Action Partnership, and CAPLAW. She holds a Master of Business Administration from NMSU where she also received her Bachelor of Business Administration in Marketing, with Distinction in University Honors.

### **Lanikque Howard, PhD**

#### **Office of Community Services, Administration for Children and Families**

Dr. Lanikque Howard is the Director in the Office of Community Services, Administration for Children and Families (ACF). As the OCS Director, she provides leadership and oversight of over \$6 billion in mandatory and discretionary grants through six social service and community development programs. Dr. Howard served three years in the Obama Administration in the Immediate Office of the Assistant Secretary supporting the development and implementation of ACF policy and cross-cutting initiatives. Prior to returning to ACF, Dr. Howard was the Senior Administrator for Programs at First 5 Alameda County, where she oversaw a number of strategic programs, initiatives, and partnerships aimed at addressing the causes and consequences of poverty, reducing racial disparities, and

maximizing the potential of young children and their families. During her tenure, she oversaw First 5's place-based initiatives, early care and education workforce development program, fatherhood and engagement strategies, concrete support programs, maternal and infant health strategies, and medical-legal partnerships. Dr. Howard also worked at the Institute for Research on Poverty, where she provided technical assistance to county and state government agencies on a range of issues that impact the well-being of marginalized children, families, and communities, including co-leading the modification of statewide child welfare policy. Dr. Howard received a B.A. in American Studies from the University of California, Berkeley, and her MSW and Ph.D. in Social Welfare from the University of Wisconsin, Madison. Her research focused on the interaction of human service programs and how uncoordinated policies and programs affect the well-being of dually served families.

**Keith Hundley, CPA**  
**Carr, Riggs, & Ingram**

With 21 years of diversified CPA experience, Keith provides accounting and auditing services to governmental entities and not-for-profit organizations across the United States. As a part of the firm's governmental and not-for-profit audit team, Keith participates extensively in audits of community action agencies, Head Start programs, and state and local government, specializing in the Single Audit Act and the OMB Uniform Guidance. Additionally, Keith provides accounting and consulting services to not-for-profit organizations in the areas of budgetary compliance, cost allocation plans, tax planning and compliance, special transactions accounting assistance, fiscal operations training and technical assistance, and board training. As a consultant for the Head Start National Center on Program Management and Fiscal Operations' Fiscal Consultant Initiative, Keith provides T/TA services to Head Start programs across the nation. Keith regularly serves as a continuing education leader for CRI as well as a certified facilitator in the CRI Leadership Academy. Keith is an active member of the American Institute of Certified Public Accountants (AICPA) and the Alabama Society of Certified Public Accountants (ASCPA). Keith is a 2011 inductee to the Troy University Accounting Hall of Honor.

**Charisse Johnson**  
**Federal Office of Community Services**

Charisse is the Director of the Division of Community Assistance, which administers the Community Services Block Grant (CSBG). Ms. Johnson's career in human services spans over 30 years in a wide range of roles and leadership positions. All of Ms. Johnson's roles have required her to act as a change leader. Ms. Johnson's work in the Administration for Children and Families began in 2010 as a Program Specialist in the Children's Bureau within the Office on Child Abuse and Neglect. In 2012, Ms. Johnson became the Branch Chief for the Healthy Marriage and Responsible Fatherhood Discretionary Grant Program in the Office of Family Assistance. Since 2018, Ms. Johnson served as the Director of the Division of Community Strengthening Grants in the Office of Grants Management. Prior to becoming a federal employee, Ms. Johnson worked in North Carolina's child welfare system. From 2007 to 2010, Charisse served as the Section Chief for North Carolina's Child Welfare System, and in that capacity provided primary leadership and oversight for the state's child welfare system. Ms. Johnson also has experience in the non-profit sector, and has served on a number of state and national boards and advisory groups. As the Deputy Director of Wayne Action Group for Economic Solvency (WAGES), a Community Action Agency in North Carolina, Ms. Johnson had oversight for Head Start, Early Head Start, CSBG, child care services, and a home visiting program. Ms. Johnson earned a Master's Degree in Social Work from East Carolina University in Greenville, North Carolina.

**Anita Lichtblau, Esq.**  
**Casner & Edwards, LLP**

Anita is a partner in the Nonprofit Organizations Law practice of Casner & Edwards, a Boston law firm which provides comprehensive legal advice to tax exempt organizations and businesses and individuals involved in nonprofit matters. Her areas of legal expertise include nonprofit formation and affiliations, governance, fundraising, lobbying and political activity, employment, and government and foundation grants and contracts. Before joining Casner & Edwards, Anita served for fifteen years as both the General Counsel for Action for Boston Community Development (ABCD), a large nonprofit human services organization and Community Action Agency (CAA) that provides Head Start and other services to low-income people, and Executive Director of Community Action Program Legal Services (CAPLAW), a nonprofit providing legal training and technical assistance to the approximately 1,000 CAAs across the country. In those positions, she advised, provided training, and wrote numerous articles and publications on many issues. She presented hundreds of in-person workshops and webinars across the national Community Action network. Prior to holding those positions, Anita was a senior trial attorney with the United States Department of Justice handling white collar criminal cases in federal courts in New England and practiced with the Boston firm Hill & Barlow and the Washington D.C. firm Steptoe & Johnson. Anita is a graduate of Harvard Law School and Cornell University.

**Ann Linehan, MEd**  
**Federal Office of Head Start**

Ann Linehan is the Deputy Director of Office of Head Start (OHS). Prior to this position, she has held senior management positions in OHS for 20 years overseeing the Divisions of Program Development, Quality Assurance, and Program Operations. Ann's leadership has been instrumental in the roll out of improvements to the monitoring systems and in OHS' efforts to implement risk mitigation strategies to improve program performance and increase accountability. Ann began her federal career in 1992 in Region I as the Head Start Regional Program Manager responsible for Head Start programs in New England. Before joining the federal government

she was the Executive Director of a nonprofit agency for nearly a decade that provided Head Start and Child Care services in eight communities in Massachusetts. Ann began her career as a special needs teacher for medically fragile children. She holds a BS in Sociology and Psychology and a master's in Education from Boston State.

**Tiffany Marley, CCAP, NCRT**

**National Community Action Partnership**

Tiffany is the Vice President for Practice Transformation at the National Community Action Partnership, where she leads training and technical assistance strategies to maximize impact and transform anti-poverty practices of the Community Action Network. This work has many dimensions including leadership of the National Learning Communities Resource Center (LCRC)—the national Community Action innovations hub for addressing the causes and conditions of poverty, working with CAAs to redesign their programmatic strategies, and collaborating with governmental and private stakeholders on special initiatives to transform organizations and systems. A Whole Family Approach and Institutional Equity leader, Tiffany has successfully led multiple intensive technical assistance cohorts aimed to transform organizational and anti-poverty practice. She also serves as a thought-partner to the CEO on national racial equity implementation and other strategic initiatives. Tiffany is a Head Start Alumni and touts her personal transformation from being Community Action customer to becoming a national Community Action leader. She served as the Training Coordinator for the North Carolina Community Action Association prior to joining the Partnership team. Tiffany is the former Director of Black Church Studies at Duke University Divinity School and has over 17 years of senior-level experience in the academic, faith-based, and nonprofit sectors. She is a Certified Community Action Professional, Nationally Certified ROMA Master Trainer, and a Rx Racial Healing Practitioner. She also holds a Nonprofit Management Executive Certificate from Georgetown University McCourt School of Public Policy, a Master of Divinity from Duke University, and a Bachelor of Science in Secondary Mathematics Education from North Carolina State University. Her biggest accomplishment is that she is the mother of twins, Randi and Jesse, whom she is grooming to become future leaders.

**Betsey Andrews Parker**

**Community Action Partnership of Strafford County**

Betsey is the CEO of the Community Action Partnership of Strafford County in New Hampshire. Prior to her tenure at CAPSC, she was the Public Health Practice Lead at URS Corporation where she provided program, planning, and training to the U.S. Department of Health and Human Services (HHS), U.S. Department of Agriculture (USDA) and Federal Emergency Management Agency (FEMA). She has managed private and federal grants for municipal emergency planning, drug-free community initiatives, public health prevention, and after-school programs. She also has extensive experience managing local, state, and federal programs. She is currently the President of the New England Community Action Partnership, Past President of the Rotary Club of Dover, and three term Vice Chair of the Dover School Board. Her agency was named one of the top Women-Led Nonprofits in NH by Business NH Magazine for 2013 and 2015. You may also know her from her famous dancing video.....#DancingCEO!

**James Paul, Esq.**

**Ogletree Deakins**

Jim is a Shareholder in the St. Louis office of national labor and employment law firm Ogletree Deakins. Jim has extensive experience in handling labor and employment law litigation and appeals in federal and state courts and claims/investigations in various governmental agencies. Jim also regularly advises employers on all labor and human resource management issues, with special expertise and emphasis on accommodating employee disabilities, work restrictions, and medical leaves of absence. Jim holds Labor Relations and Economics degrees from Saint Louis University and his law degree from Washington University. He has received the top "AV Rating" by Martindale-Hubbell Law Directory, has been named since 2010 in the annual editions of The Best Lawyers in America as a top labor and employment lawyer and litigator (including "The 2016 St. Louis Employment Litigator of the Year"), and has been listed in Super Lawyers Magazine since 2008.

**Michelle Picklesimer**

**South Central Community Action Partnership, Inc.**

Michelle Picklesimer is the Chief Financial Officer for South Central Community Action Partnership, Inc. (SCCAP) in Twin Falls, Idaho. She has worked with grant-funded programs for over 25 years, with an extensive background in the financial management and administration of Weatherization programs, Community Service Block Grants, Low Income Home Energy Assistance programs, Housing programs, and other programs including Head Start. Michelle helped SCCAP start a for-profit company which primarily makes weatherization services available to all residents in their service area. For the last 15 years she has been providing financial management training and technical support to other nonprofits and state offices.

**Rick Pins, Esq.**

**Stinson LLP**

Rick is a Partner in the labor and employment law practice groups at Stinson LLP. He splits his practice equally between the labor and employment disciplines, and both counsels and litigates on behalf of clients. Rick also has considerable commercial litigation experience. He has appeared before numerous state and federal judges and administrative agencies, including the Department of

Labor, the National Labor Relations Board and the Equal Employment Opportunity Commission (EEOC). Rick counsels clients daily in a variety of employment-related areas, including wage and hour, drug and alcohol testing, Family and Medical Leave Act (FMLA), discrimination, hiring, discipline, separation, privacy, background checking, record keeping, and workplace violence. He also counsels clients on compliance with state and federal prevailing wage laws and transportation regulations. Rick frequently trains supervisors and employees on the basics of employment law, positive employee relations, and preventing workplace harassment and discrimination. He has been regularly selected for inclusion in both Super Lawyers® and Top 40 Employment Super Lawyers®. Rick received his bachelor's degree in Economics and Political Science from the University of Wisconsin-Madison and his law degree from the University of Minnesota Law School.

**Bertha Proctor, EdD, CCAP**

**[Pace Community Action Agency, WiseCAP Training & Consulting, CAPLAW Board](#)**

Bertha is the Chief Executive Officer and Head Start Director of Pace Community Action Agency, the Lead Consultant for WiseCAP Training & Consulting, and the Board President of CAPLAW. Her expertise in leadership training and staff development stem from advanced education in Communications, Human Resource Development (she is a Senior Human Resource Professional), and Educational Leadership. In 2015, she received the Knox County Chamber of Commerce's Woman in Business Award. Bertha has served as an adjunct faculty member at local universities, a member on various boards, and she has conducted state and national trainings. She has also developed and implemented a variety of management systems and business initiatives.

**Ken Robinette**

**[South Central Community Action Partnership, Inc.](#)**

For 40 years Ken has been with the South Central Community Action Partnership, Inc. (SCCAP) in Twin Falls, Idaho. He has been the Chief Executive Officer for the past 19 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youths ages 16 to 18 years old. In 1981 Ken became the Director of the Weatherization/Housing Rehab program for SCCAP. Ken is the current Vice President of Energy Outwest, an organization of energy conservation professionals in the western United States that promotes and advances the technical capacity of the region's environmental and energy services network and to provide quality service targeting but not limited to low-income households. In 2006 Ken's organization created a for-profit LLC company called Home Energy Management which is owned by SCCAP to provide weatherization services for middle to upper income homeowners with the profits going to support SCCAP's low-income weatherization program.

**Andria Ryan, Esq.**

**[Fisher Phillips LLP](#)**

Andria Ryan is a partner in the Atlanta office and represents employers in virtually every area of employment and labor law. She serves as co-chair of the Hospitality Industry Group and is currently a member of the firm's COVID-19 Taskforce, a cross-disciplinary team of attorneys dedicated to advising employers on the many workplace law aspects of the global coronavirus pandemic. Andria represents employers throughout the United States in defending employment discrimination and harassment cases as well as handling traditional labor matters such as unfair labor practices and union campaigns. She spends much of her time counseling employers in day to day employment and labor decisions and educating employers about prevention and practical solutions to workplace problems. She is a frequent speaker to industry groups and human resources professionals on such topics as avoiding harassment in the workplace, maintaining a union free workplace, avoiding discrimination claims, proper interviewing, and effective discipline and discharge techniques. She is a recipient of the Chairman's Award from the Colorado Hotel & Lodging Association for her development of the Employment Compliance Guide for Colorado Hospitality Employers. She and Fisher Phillips have also been honored by the South Carolina Hospitality Association as Supplier of the Year – Stars of the Hospitality Industry Awards 1994-2015 and the Washington Lodging Association for valuable contributions by an Allied member. Andria is "AV" Peer Review Rated by Martindale-Hubbell. She received her bachelor's degree from American University and her law degree from Catholic University of America, Columbus School of Law.

**Teresa M. Santalucia, Esq.**

**[Klein Hornig LLP](#)**

Teresa is a Partner at Klein Hornig LLP, a mission-driven firm dedicated to developing and preserving affordable housing and to revitalizing communities with legal solutions that are smart and efficient. Teresa's practice includes a wide range of affordable housing, community development, and nonprofit matters. In the area of affordable housing, she regularly assists nonprofits and housing authorities with mixed-finance, low-income housing tax credits, public housing, and community development projects throughout the country. In the nonprofit arena, she serves as outside corporate counsel and advises nonprofit clients on issues such as corporate formation and governance, tax exemption, charitable registration and fundraising, and other business matters including joint ventures, strategic affiliations, and contract negotiations and review. Teresa has been particularly active in advising nonprofit boards, officers, advisory committees, and senior staff on an extensive range of matters, including governance documents, corporate policies, and tax compliance issues at both the state and federal level. Teresa has facilitated numerous seminars and trainings for nonprofits, including presentations on Lobbying and Advocacy, Corporate Governance, and Joint Ventures.

## **Kay Sohl**

### **Kay Sohl Consulting**

Kay has provided training and consultation for Executive Directors, CFOs, and Boards of Directors of over 8,500 nonprofit organizations throughout the United States. She focuses her work on rethinking nonprofit strategies for financial sustainability, Board financial oversight, compliance with federal funds management requirements, and the challenges of nonprofit accounting and financial reporting. She is a frequent presenter for state and regional coalitions of nonprofits, and continuing professional education programs for attorneys and accountants serving the nonprofit sector. She has worked extensively with Community Action Agencies, CAPLAW, and the National Community Action Partnership. Kay has authored multiple financial management toolkits for CAAs and other nonprofits, including resources for cost allocation, financial reporting, dashboard development, and the new OMB Uniform Guidance. She is a licensed public accountant and graduate of University of California at Berkeley. She has a master's in teaching from Reed College and completed post-graduate work in accounting and business law at Portland State University.

## **James Thomas, JD, CPA**

### **CliftonLarsonAllen LLP**

Jim is a nonprofit principal with CliftonLarsonAllen LLP (CLA) and has 34 years of nonprofit assurance, tax and consulting experience with CLA. He serves as a leader in the Chicagoland and national CLA nonprofit groups. Jim is also an attorney providing a variety of services to clients, including handling non-traditional services such as operational reviews, forensic engagements, cash flow and budgeting consulting, and human resources consulting. Jim received his Juris Doctorate from Loyola Law School. He earned a bachelor of science in accounting from Illinois State University and is a member of American Institute of Certified Public Accountants (AICPA) and the Illinois CPA Society (ICPAS).

## **R. Brian Tipton, Esq.**

### **The Private Client Law Group**

Brian is Managing Director at The Private Client Law Group in Atlanta, Georgia. Previously, he worked in Montgomery, Alabama for the law firm Sasser, Sefton, Brown, Tipton & Davis, P.C. as a Shareholder. Prior to entering private practice, he completed a judicial clerkship with Senior United States District Judge James H. Hancock, of the Northern District of Alabama. His practice is concentrated in the representation of nonprofits and other tax-exempt organizations. He regularly represents Community Action Agencies and Head Start Programs in the areas of regulatory compliance, audits, funding source disputes, administrative appeals, and litigation. In addition, Brian consults with organizations on governance, human resources, programmatic, and corporate matters, and develops and presents training programs for nonprofits. He is a summa cum laude graduate of both the Louisiana State University and the Cumberland School of Law of Samford University.

## **Denes Tobie, CPA**

### **Wipfli LLP**

Denes is a Certified Public Accountant and Partner in Wipfli LLP's nonprofit practice (NPO). She oversees audit engagements and consulting opportunities and works with clients to maintain compliance with laws and regulations. In addition, as a leader of NPO's training practice, she trains nonprofits and government agencies in regulations, best practices, and governance. She graduated from University of Wisconsin, Platteville with a degrees in accounting and business administration.

## **Yasmina Vinci**

### **National Head Start Association**

As a seasoned leader in both executive and policy roles, Yasmina's professional experience and capabilities have delivered improvements in the lives of children at the national, state, and local levels. She is now Executive Director of the National Head Start Association (NHSA). Yasmina came to the National Head Start Association after several years as principal and founder of EDGE Consulting Partners. As the first Executive Director of the National Association of Child Care Resource & Referral Agencies (now Child Care Aware America) she led NACCRRRA's transition from an all-volunteer association of fewer than 200 child care resource and referral agencies to a powerful national network of 860+ community-based organizations. Under her leadership, NACCRRRA organized the national grassroots campaign that was instrumental to securing the funding for child care in the welfare reform legislation. In State government, she had the opportunity to supervise Head Start research, administer the federal Dependent Care Grant and plan for New Jersey's implementation of the very first Child Care and Development Block Grant. Yasmina currently serves on numerous advisory boards and is a member of the International Organizing Committee for the World Forum on Early Care and Education. Yasmina received her Master in Public Administration degree from Harvard's Kennedy School of Government.

## **Luther Wright, Jr., Esq.**

### **Ogletree Deakins**

Luther Wright, Jr., is Of Counsel and Assistant Director of Client Training at Ogletree Deakins. After graduating from Vanderbilt University School of Law, Luther began his career with a general practice firm in the litigation section. He spent the first several years of his legal career practicing in the general litigation area before joining the Labor & Employment team. He has significant experience in the areas of labor and employment law, corporate business litigation and complex litigation, including class action and collective

action lawsuits. He typically represents management in all forms of employment discrimination litigation, including litigation based on federal anti-discrimination statutes, state statutes and common law, violence in the workplace, Fair Labor Standards Act claims and independent contractor disputes. Luther is a member of Ogletree's Diversity and Inclusion Action Team that provides timely client advice and guidance on diversity related matters. Luther also devotes a significant amount of his practice to day-to-day client advice, general supervisor/employee training, training and advising on diversity and inclusion issues and workplace violence issues, and also acts as the Assistant Director of Client Training as part of the Ogletree Deakins Learning Solutions ("ODLS") team. ODLS provides employee and supervisor training in a variety of formats, including in-person training, training by webinar/webcasts and customized video training products.

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