Conference Program
As a member of the CAPLAW Attorney Network, our law firm is committed to advancing the legal interests of Community Action and Head Start. At Sasser, Sefton, Connally, Tipton & Davis, P.C., we’re not just lawyers. We’re lawyers who represent Community Action Agencies and Head Start Programs.
Dear CAPLAW Conference Participants:

Welcome to CAPLAW’s 2009 National Training Conference in Seattle! We are delighted that you have chosen to attend our annual update on the most pressing legal, financial, and management issues facing the Community Action network today. We hope that you will take full advantage of the expert-led conference workshops and panels and the opportunity to learn from your colleagues, and enjoy the many attractions in this vibrant city.

CAPLAW strives to supply the legal knowledge and tools necessary to sustain your organizations and maximize available resources for the poor. Through consultations, training conferences, workshops, audio conferences, online resources, e-bulletins, the CAA Financial Network, publications such as the CAPLAW Governance Case Studies, and the CAPLAW Legal Update newsletter, CAPLAW keeps you and your local counsel informed of the latest legal developments.

This year’s conference will focus on the opportunities and challenges presented by the economic stimulus – from the conference’s opening panel, in which federal officials will discuss their agencies’ expectations for the use of stimulus funds, to the conference’s closing session specifically addressing Weatherization stimulus issues. Throughout the conference, workshop presenters will explore a wide range of stimulus-related issues.

We are particularly pleased this year to welcome keynote speaker Ronald Marlow, Assistant Secretary for Access and Opportunity, Massachusetts Executive Office for Administration and Finance, who will present a thought-provoking address on the stimulus and its impact on state and local anti-poverty efforts, both while Recovery Act funds are available and afterward. We are also pleased that David Bradley, Executive Director of the National Community Action Foundation, will be providing us with an inside-the-Beltway perspective on the stimulus and its effect on the Community Services Block Grant network.

Please enjoy the conference and your stay in Seattle. We hope that you will leave the conference with an enhanced understanding of critical legal issues and many new ideas on how to use the law to effectively implement Community Action goals.

Winston Ross  
President of CAPLAW

Anita S. Lichtblau  
Executive Director/General Counsel

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National Community Action Management Academy

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Executive Director, National Community Action Foundation
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**Anita Lichtblau, Esq.**
Executive Director and General Counsel

**Eleanor A. Evans, Esq.**, Deputy Director and Senior Counsel

**Allison Ma’luf, Esq.**, Associate Counsel

**Bernadette Hood**, Administrative Coordinator and Executive Assistant

**Sol Israel**, Communications Assistant
With appreciation for Bob Coard’s 20 years of service as founding president of CAPLAW, we look forward to Bob’s continued service on the CAPLAW Board.

The CAPLAW Board of Directors and Staff
## Conference-at-a-Glance

*Unless otherwise noted, all conference functions will take place on the second floor of the hotel*

### MONDAY, JUNE 22

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<tr>
<th>Time</th>
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<th>Location</th>
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<tbody>
<tr>
<td>3:00 p.m. – 5:00 p.m.</td>
<td>Conference Registration and Information</td>
<td>Foyer</td>
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### TUESDAY, JUNE 23

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<th>Location</th>
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<tbody>
<tr>
<td>8:00 a.m. – 5:30 p.m.</td>
<td>Registration/Information</td>
<td>Foyer</td>
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<tr>
<td>8:00 a.m. – 12:15 p.m.</td>
<td>Pre-Conference Tour</td>
<td>Meet in hotel lobby</td>
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<tr>
<td>(Pre-registration required)</td>
<td></td>
<td>(1st Floor, near fireplace)</td>
</tr>
<tr>
<td>8:30 a.m. – 12:00 p.m.</td>
<td>Pre-Conference Workshops</td>
<td>Grand Ballroom B</td>
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<tr>
<td>A. Adventures in Nonprofit Governance: Case Studies</td>
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<tr>
<td>B. OMB Circular Overview</td>
<td></td>
<td>Grand Ballroom D</td>
</tr>
<tr>
<td>1:00 p.m. – 3:00 p.m.</td>
<td>Opening Session</td>
<td>Metropolitan (3rd Floor)</td>
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<tr>
<td>Welcoming Remarks, Panel Discussion on the Economic Stimulus</td>
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<tr>
<td>3:30 p.m. – 5:30 p.m.</td>
<td>Workshop Session One</td>
<td>Grand Ballroom D</td>
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<tr>
<td>1A. Governance: Introduction to Community Action</td>
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<td>1B. HR: Ensuring Equal Opportunity in the Workplace</td>
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<td>1C. Constructing an Agency-Wide Budget</td>
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<td>1D. Trust: The Key to Collaborative Leadership</td>
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<tr>
<td>5:45 p.m. – 7:30 p.m.</td>
<td>Networking Reception</td>
<td>Cirrus (35th Floor)</td>
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### WEDNESDAY, JUNE 24

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<th>Time</th>
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<tbody>
<tr>
<td>7:30 a.m. – 5:30 p.m.</td>
<td>Registration/Information</td>
<td>Foyer</td>
</tr>
<tr>
<td>7:30 a.m. – 8:30 a.m.</td>
<td>Continental Breakfast and Legislative Update with David Bradley</td>
<td>Metropolitan (3rd Floor)</td>
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<tr>
<td>8:45 a.m. – 10:15 a.m.</td>
<td>Workshop Session Two</td>
<td>Grand Ballroom C</td>
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<tr>
<td>2A. Governance: Effective Board Procedures</td>
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<td>2B. HR: ADA and FMLA Update</td>
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<td>2C. Fiscal: 501(c)(3) Hot Topics</td>
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<td>2D. Head Start Update</td>
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<td>2E. Primer on Privacy and Confidentiality</td>
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<tr>
<td>10:30 a.m. – 12:00 p.m.</td>
<td>Workshop Session Two (continued)</td>
<td>Willow</td>
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<tr>
<td>12:15 p.m. – 1:30 p.m.</td>
<td>Keynote Luncheon</td>
<td>Metropolitan (3rd Floor)</td>
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<tr>
<td>2:00 p.m. – 3:30 p.m.</td>
<td>Workshop Session Three</td>
<td>Willow</td>
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<tr>
<td>3A. Governance: Developing and Managing Community Partnerships</td>
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<tr>
<td>3B. HR: Rightful Discharge: Terminating Without Litigating</td>
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<td>3C. Fiscal: Spotlight on Social Enterprise (Part I)</td>
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<td>3D. Federal Housing Law and Policy Update</td>
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<td>3E. Got Funding? Federal Nutrition Programs</td>
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<tr>
<td>4:00 p.m. – 5:30 p.m.</td>
<td>Workshop Session Four</td>
<td>Willow</td>
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<td>4A. Governance: Contending with Conflicts of Interest</td>
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<td>4B. HR: Conducting Bulletproof Workplace Investigations</td>
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<tr>
<td>4C. Fiscal: Spotlight on Social Enterprise (Part II)</td>
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<td>4D. Focus on the Foreclosure Crisis</td>
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<td>4E. Leadership Transition Strategies</td>
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### THURSDAY, JUNE 25

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<tr>
<th>Time</th>
<th>Activity</th>
<th>Location</th>
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<tbody>
<tr>
<td>8:00 a.m. – 12:00 p.m.</td>
<td>Conference Information</td>
<td>Foyer</td>
</tr>
<tr>
<td>7:45 a.m. – 8:45 a.m.</td>
<td>Continental Breakfast/Roundtables</td>
<td>Cedar/Douglas/Juniper/Grand Ballroom C Willow A</td>
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<tr>
<td>7:45 a.m. – 8:45 a.m.</td>
<td>Attorney Network Breakfast</td>
<td>Willow A</td>
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<tr>
<td>9:00 a.m. – 11:00 a.m.</td>
<td>Workshop Session Five</td>
<td>Willow B</td>
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<td>5A. Governance: Transformational Leadership and the High-Impact CAA</td>
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<tr>
<td>5B. HR: Health and Welfare Plan Check-Up</td>
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<td>5C. Fiscal: Proficiency in Procurement</td>
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<tr>
<td>5D. The Art of Advocacy</td>
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<tr>
<td>11:10 a.m. – 12:00 p.m.</td>
<td>Closing General Session: Weatherization Panel</td>
<td>Grand Ballroom C</td>
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2009 Annual Legal Training Conference

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Portland, ME 04101
800.356.1781
207.775.3197
Conference Schedule

**Monday, June 22**

3:00 p.m. – 5:00 p.m.  Conference Registration and Information  Foyer

**Tuesday, June 23**

8:00 a.m. – 5:30 p.m.  Registration/Information  Foyer

8:00 a.m. – 12:15 p.m.  Pre-Conference Tour  Meet in hotel lobby (1st Floor, near fireplace)  (Pre-registration required)

8:30 a.m. – 12:00 p.m.  Pre-Conference Workshops
  
  **A. Adventures in Nonprofit Governance: Case Studies**  Grand Ballrom B
  CPE Field of Study: Specialized Knowledge and Applications  CPE Level: Overview
  In this interactive session, you will use case studies to delve into four critical areas of nonprofit governance: the board-executive director relationship; using financial statements; setting the executive director’s compensation; and encouraging whistleblowers. Participants will be divided into small discussion groups. Each group will arrive at a solution for each case and share it with the session as a whole. Then, the workshop leader will summarize the solutions and provide a brief presentation on best practices. Each participant will be provided with a copy of the cases before the session so that everyone can become familiar with the facts in advance. This is an opportunity to break away from the traditional lecture format, express your opinions, meet other CAA and nonprofit leaders from around the country, and learn from the experience of others.
  
  **Speaker:**  Jack Siegel, Esq., CPA, Charity Governance Consulting LLC

  **B. OMB Circular Overview**  Grand Ballrom D
  CPE Field of Study: Specialized Knowledge and Applications  CPE Level: Overview
  Federal grantees are required to follow Office of Management and Budget (OMB) circulars on grants administration and cost principles. Failure to comply can result in dire consequences. Attend this workshop and develop a better understanding of the requirements of these circulars and how to improve your organization’s compliance with them. Based on an annotated guide to OMB Circular A-122 on cost principles, you will review both the plain language of individual rules and how to apply the principles in combination to particularly thorny issues faced by grantees. You will also learn about the impact of stimulus funding on indirect cost rates and cost allocation plans.
  
  **Speaker:**  Dan Miller, CPA, Meliora Partners

1:00 p.m. – 3:00 p.m.  Opening Session

1:00 p.m. – 1:20 p.m.  Welcoming Remarks
  
  **Winston Ross, President, CAPLAW**
  Gale Hennessy and Patricia Steiger, CAPLAW Board Members, 2009 Conference Chairs
  Bob Swanson, Executive Director, Washington State Community Action Partnership

1:20 p.m. – 3:00 p.m.  Panel Discussion on the Economic Stimulus  Metropolitan Ballroom (3rd Floor)
  
  Top federal agency officials will update us on the progress of and issues related to the three key stimulus-funded programs for Community Action: Community Services Block Grant, Head Start, and Weatherization. We will also hear from the national association of state CSBG officials on how the ARRA requirements will impact reporting for CSBG. Bring your questions for a Q&A.
  
  **Speakers:**  Jena Bjejlind, NASCSP
  Seth Hassett, Office of Community Services, HHS
  Ann Linehan, Office of Head Start, HHS
  Gil Sperling, U.S. Department of Energy
Conference Schedule
TUESDAY, JUNE 23

3:30 p.m. – 5:30 p.m.  Workshop Session One
Recommended CPE Credit: 2.0

1A. Governance: Introduction to Community Action  Grand Ballroom D
CPE Field of Study: Specialized Knowledge and Applications  CPE Level: Overview
Whether you are new to Community Action or a veteran of the War on Poverty, this session is for you. You will review key developments in the legal history of Community Action and explore the ins and outs of the Community Services Block Grant (CSBG) Act, the linchpin of the current Community Action movement. Topics will include: the composition, roles, and responsibilities of tripartite boards; limitations on the use of CSBG funds; allocation, payment and carryover of those funds; reduction and termination of CSBG funding; designation of new eligible entities; and implications of the economic stimulus on CAAs’ CSBG funding.
Chair: Patricia Steiger, Management Consultant and CAPLAW Board Member
Speakers: Allison Ma’luf, Esq., CAPLAW
Seth Hassett, Division of State Assistance, Office of Community Services, HHS
R. Brian Tipton, Esq., Sasser, Sefton, Connally, Tipton & Davis, P.C.

1B. HR: Ensuring Equal Opportunity in the Workplace  Grand Ballroom B
CPE Field of Study: Business Law  CPE Level: Overview
Notwithstanding a strong commitment to principles of equal employment opportunity (EEO), nonprofit organizations are simply not immune from discrimination complaints, EEOC charges and litigation. This type of organizational “people problem” ranks among the most expensive, time consuming, and emotionally draining for nonprofit managers. More challenging, federal and state EEO law is currently undergoing a “growth spurt,” with recent changes already in effect to the Americans with Disabilities Act and the Equal Pay Act, among others. This fun, interactive seminar will acquaint participants with important recent changes in EEO law and will address the seemingly innocent assumptions that can lead to claims of unlawful discrimination. Because this seminar’s focus is “people problem prevention,” participants will also learn the important strategies to defend against allegations of workplace discrimination.
Speaker: Merrily S. Archer, Esq., Fisher & Phillips, LLP

1C. Fiscal: Constructing an Agency-Wide Budget  Grand Ballroom C
CPE Field of Study: Finance  CPE Level: Overview
This workshop will address important considerations in creating a master budget for your organization. Topics will include: cost allocation across grants; wage/salary allocation spread across the organization; non-grant revenue and expenses; considering the whole picture; grants that don’t coincide with your fiscal year; and the effect of stimulus funding on your organization’s budget.
Speaker: Dan Miller, CPA, Meliora Partners

1D. Trust: The Key to Collaborative Leadership  Grand Ballroom A
CPE Field of Study: Personnel/HR  CPE Level: Overview
In today’s time of rapid change and shortage of resources, managerial success depends more than ever on successfully multiplying individual effort. This has given rise to the importance of collaborative leadership – going beyond mere cooperation and coordination in a “team” environment to continuous use of the power of interdependency and commitment to the value of working with and through others, enabled by a climate of trust. Trust is the essential building block of collaborative efforts – trust in the leader, extension of trust by the leader, and trust among co-workers. This interactive session will explore the practical meaning of trust and display 14 specific behaviors that build trust. This session is ideal for managers and supervisors at all levels.
Speaker: Norval D. (John) Settle, Esq., SETTLEment Associates, LLC

5:45 p.m. – 7:30 p.m.  Networking Reception  Cirrus (35th Floor)
7:30 a.m. – 5:30 p.m.  Registration/Information  Foyer
7:30 a.m. – 8:30 a.m.  Continental Breakfast and Legislative Update  Metropolitan Ballroom (3rd Floor)  with David Bradley
8:45 a.m. – 10:15 a.m.  Workshop Session Two  Recommended CPE Credit: 3.5

2A. Governance: Effective Board Procedures  Grand Ballroom C
CPE Field of Study: Specialized Knowledge  CPE Level: Overview
Nonprofit bylaws often state that the job of the board of directors is to supervise, control, and direct the affairs of the corporation. But what does this really mean in practice? Bring your board members and find out in this hands-on, interactive session, which will examine the nuts and bolts of board structure and the mechanics of board operations. Topics will include: the board’s role; board member selection, election, and recruitment; optimal board size; officers of the board; board committees; developing meeting agendas; meeting procedures and decorum; recording and maintaining meeting minutes; D&O insurance; and maintaining and following bylaws and other governance documents. The session will rely on lecture, group discussion, and several short cases and will take advantage of the collective knowledge and experience of everyone in the room.
Speakers:  Jack Siegel, Esq., CPA, Charity Governance Consulting LLC  Patricia Steiger, Management Consultant and CAPLAW Board Member

2B. HR: ADA and FMLA Update  Grand Ballroom B
CPE Field of Study: Business Law  CPE Level: Update
Major changes to the Americans with Disabilities Act (ADA) and new Family and Medical Leave Act (FMLA) regulations took effect earlier this year. Highlights of the FMLA changes include expanding and clarifying military leave, employer and employee notice obligations and medical certification requirements. Notable ADA changes include broadening the definition of “disability,” expanding the list of “major life activities,” and disregarding mitigating measures in disability determinations. Don’t get caught off-guard – familiarize yourself with the practical implications of the new rules and identify steps your organization should take to ensure that its personnel policies and procedures are up to date.
Speaker:  Peter Ebb, Esq., Ropes & Gray

2C. Fiscal: 501(c)(3) Hot Topics  Grand Ballroom D
CPE Field of Study: Taxes  CPE Level: Update
Get up to speed on the latest tax law developments affecting 501(c)(3) organizations. Find out how 501(c)(3) organizations are responding to the new IRS Form 990 and get tips on completing the form. One area the new form highlights is executive compensation – learn what your organization should be doing to properly set and report compensation of its top managers. Review tax rules on expense reimbursements and get the 4-1-1 on how the IRS treats personal use of cell phones, Blackberrys and similar devices.
Speaker:  Jeanne Schuster, Esq., CPA, Ernst & Young LLP
2D. Head Start Update  
Grand Ballroom A  
CPE Field of Study: Specialized Knowledge  
CPE Level: Update  
Get the up-to-the-minute information on Head Start stimulus funding: how ACF is allocating funds; what rules apply; and how grantees can ensure that their fiscal systems, fiscal staff, and board oversight of finances are up to the task of managing large amounts of new funding in an accountable manner. Although it has been over a year since Congress made major changes to the Head Start Act, uncertainty about how to comply with many of the Act’s new requirements still abounds. Discover how Head Start grantees are responding to the changes in the law and what HHS currently expects in areas such as: the respective roles of the board and policy council, board composition, conflicts of interest, and enrollment. Now that the law permits recompetition for Head Start grants, it is more important than ever for grantees to pass their reviews with flying colors. Learn about how the new recompetition process is likely to work, get familiar with the new review protocol and find out what your organization needs to do to prepare for its next review.  
Chair: Catherine Caputo-Hoskins, Salt Lake Community Action Program and CAPLAW Secretary  
Speakers: Teresa Cox, Mid-Willamette Valley Community Action Association  
Ann Linehan, HHS Office of Head Start  
Robert Sasser, Esq., and R. Brian Tipton, Esq., Sasser, Sefton, Connally, Tipton & Davis, P.C.

2E. Primer on Privacy and Confidentiality  
Willow  
CPE Field of Study: Specialized Knowledge  
CPE Level: Overview  
With identity theft on the rise, it is more important than ever for CAAs and other organizations serving vulnerable populations to safeguard their clients’ and employees’ personal information. Examine what legal rules apply – including the privacy and security requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) (and the stimulus act’s changes to those requirements) – and find out what your organization should be doing to protect the personal information it collects from its clients and employees. Also analyze situations where the desire, and often legal responsibility, to protect clients’ and employees’ privacy conflicts with requests or subpoenas from third parties for client or employee records, funding source requirements for centralized data collection, and common practices of sharing client information within the organization or with other organizations serving clients’ needs.  
Speakers: Eleanor A. Evans, Esq., and Allison Ma’luf, Esq., CAPLAW

10:30 a.m. – 12:00 p.m.  
Workshop Session Two (continued)

12:15 p.m. – 1:30 p.m.  
Keynote Luncheon  
Metropolitan Ballroom (3rd Floor)  
Greetings from Community Action Partners  
Keynote Speaker  
Ronald Marlow, Assistant Secretary for Access and Opportunity in the Massachusetts Executive Office for Administration and Finance

2:00 p.m. – 3:30 p.m.  
Workshop Session Three  
Recommended CPE Credit: 1.5

3A. Governance: Developing and Managing Community Partnerships  
Grand Ballroom C  
CPE Field of Study: Specialized Knowledge  
CPE Level: Overview  
Strategic partnerships are essential to moving Community Action agendas forward but their true potential is often unseen or untapped. Learn how to identify and develop powerful partners through a "high impact" lens, and how to structure and document the partnerships to allocate responsibilities, hold partners accountable for performance and avoid legal pitfalls.  
Speakers: Anita Lichtblau, Esq., CAPLAW  
Ona Porter, Community Action New Mexico
3B. HR: Rightful Discharge: Terminating Without Litigating

Grand Ballroom B

CPE Field of Study: Business Law
CPE Level: Overview

An employer has compelling business reasons to terminate someone. Still, the former employee files suit for wrongful termination and discrimination. At-will policies and employee handbooks alone do not protect employers seeking to cut ties with employees. Learn how to properly evaluate and document terminations with an eye toward avoiding and defending litigation, including how to conduct proper reductions-in-force in today’s economic climate. Also discuss legal and practical issues in rapidly upsizing some programs on a short-term basis in response to the economic stimulus (in some cases, while downsizing other programs).

Speaker: Merrily S. Archer, Esq., Fisher & Phillips, LLP

3C. Fiscal: Spotlight on Social Enterprise (Part I)

Grand Ballroom D

CPE Field of Study: Specialized Knowledge
CPE Level: Overview

More and more nonprofits are turning to social enterprise — entrepreneurial ventures that take advantage of who they are, what they do and what they have — to further their social missions and generate earned income. In Part I of this session, hear how other nonprofits got their social enterprises (including a for-profit weatherization business run by a CAA) up and running. Discover how your organization can identify earned income opportunities based on its mission, values and assets, and examine what steps it needs to take in order to turn these opportunities into reality. In Part II, learn from an experienced nonprofit attorney about the legal and tax issues involved in starting and operating social enterprises.

Chair: Allison Ma'1uf, Esq., CAPLAW

Speakers:
David Carleton, Kitchens With Mission
Ken J. Robinette, South Central Community Action Partnership
R. Brian Tipton, Esq., Sasser, Sefton, Connally, Tipton & Davis, P.C.
LaVerne Woods, Esq., Davis Wright Tremaine LLP

3D. Federal Housing Law and Policy Update

Grant Ballroom A

CPE Field of Study: Specialized Knowledge
CPE Level: Update

Congress and the Obama Administration have moved quickly to address pressing housing needs, including adopting a stimulus package that provides $13 billion in funding for housing programs, funding for the National Housing Trust Fund and enacting the most significant revisions to the McKinney-Vento programs in many years. Come and learn about these important policy initiatives and others that may be being considered by Congress and the Administration over the rest of the year.

Speaker: Danna Fischer, Esq., National Low-Income Housing Coalition

3E. Got Funding? Federal Nutrition Programs

Willow

CPE Field of Study: Specialized Knowledge
CPE Level: Update

Federal nutrition programs nourish our children in pre-school, school-based and out-of-school programs. They also allow community based organizations to draw-down federal “entitlement” dollars – feeding all children eligible for program benefits. The economic recovery legislation and the upcoming reauthorization of the child nutrition and WIC programs provide new opportunities to expand nutrition benefits to low-income children while infusing critically-needed financial support to CAAs and other government grantees. Come hear the latest developments in Congress to answer the age-old question — Got Food?

Speaker: Ellen Teller, Esq., Food Research and Action Center
4:00 p.m. – 5:30 p.m. Workshop Session Four
Recommended CPE Credit: 1.5

4A. Governance: Contending with Conflicts of Interest
Grand Ballroom C
CPE Field of Study: Specialized Knowledge
CPE Level: Overview
Nonprofits and federal grantees are now expected – and in some cases, required – to adopt and implement conflicts of interest policies. Yet developing and following these policies can be a daunting task, given the many different rules from various sources that may apply – including the IRS, the Financial Accounting Standards Board (FASB), Head Start, HUD, the federal Office of Management and Budget (OMB) and others. Examine these rules and discuss practical considerations in crafting conflict of interest policies and in dealing with conflicts of interest.
Speakers: Cynthia Cumfer, Esq., Community Development Law Center
Eleanor A. Evans, Esq., CAPLAW

4B. HR: Conducting Bulletproof Workplace Investigations
Grand Ballroom B
CPE Field of Study: Business Law
CPE Level: Overview
One of the biggest challenges managers and HR professionals face is how to conduct a prompt, thorough and legally compliant workplace investigation. The primary objective is to resolve the problem without a lawsuit. If a lawsuit cannot be avoided, the investigation must satisfy legal obligations and stand up to intense court scrutiny. Learn how to effectively conduct investigations of harassment, discrimination and retaliation complaints, and workplace misconduct situations.
Speaker: Merrily S. Archer, Esq., Fisher & Phillips, LLP

4C. Fiscal: Spotlight on Social Enterprise (Part II)
Grand Ballroom D
CPE Field of Study: Specialized Knowledge
CPE Level: Overview
See description for workshop 3C, “Spotlight on Social Enterprise (Part I).”

4D. Focus on the Foreclosure Crisis
Grand Ballroom A
CPE Field of Study: Specialized Knowledge
CPE Level: Update
Congress and the Obama Administration have made the foreclosure crisis a top priority. Attend this session and find out about the steps being taken to help troubled borrowers, communities and renters address the foreclosure crisis. Discover how your organization can become part of the solution to this far-reaching problem.
Speaker: Danna Fischer, Esq., National Low-Income Housing Coalition

4E. Leadership Transition Strategies
Willow
CPE Field of Study: Personnel/HR
CPE Level: Overview
Filling nonprofit CEO and CFO positions is growing more challenging as the boomer generation begins its exodus from the nonprofit sector. Simultaneously, boomers exiting from corporate and public accounting careers are seeking opportunities to use their skills for community good. Explore new strategies to plan for leadership transition and create flexible opportunities for highly skilled professionals to provide transitional leadership.
Speaker: Kay Sohl, PA, Kay Sohl Consulting
THURSDAY, JUNE 25

8:00 a.m. – 12:00 p.m.  Conference Information  Foyer

7:45 a.m. – 8:45 a.m.  Continental Breakfast/Roundtables  Cedar/Douglas/Grand Ballroom C
Roundtables: Board of Directors, Fiscal, Human Resources, Head Start, Weatherization, Rural, and State and Regional Associations

7:45 a.m. – 8:45 a.m.  Attorney Network Breakfast - Stimulus Legal Issues  Willow A

9:00 a.m. – 11:00 a.m.  Workshop Session Five  Recommended CPE Credit: 2.0

5A. Governance: Transformational Leadership and the High-Impact CAA  Grand Ballroom A
CPE Field of Study: Specialized Knowledge  CPE Level: Overview
How can CAA leaders take the organization from just managing contracts to re-embracing the original Community Action mission of ending poverty through a strategy of community engagement? This workshop will focus on practical high-impact strategies, which the workshop leader has successfully taught and CAAs have implemented, that can be used within the structure of grant and contract-funded organizations.
Speaker:  Ona Porter, Community Action New Mexico

5B. HR: Health and Welfare Plan Check-Up  Willow B
CPE Field of Study: Specialized Knowledge  CPE Level: Overview
Be sure your organization’s health and welfare plans are in tiptop shape. Probe key legal requirements for these plans and learn how to cure common compliance problems. Topics to be examined in this session include: COBRA (including ins and outs of administering the COBRA premium assistance provided by the Recovery Act); the new requirements of Michelle’s Law; recent changes to the Health Insurance Portability and Accountability Act (HIPAA) privacy and security rules; administering special enrollment rights under HIPAA and the Children’s Health Insurance Program Reauthorization Act of 2009 (CHIPRA); proposed cafeteria plan regulations; final regulations on dependent care spending accounts; and the status of the law on domestic partner benefits.
Speaker:  Sarah Bhagwandin, Esq., Davis Wright Tremaine LLP

5C. Fiscal: Proficiency in Procurement  Grand Ballroom D
CPE Field of Study: Specialized Knowledge  CPE Level: Overview
Do your systems, policies, procedures, and practices comply with federal procurement requirements? This session will provide a strong foundation for assessing your current systems, identifying potential compliance problems, and developing efficient ways to ensure compliance with procurement requirements for your grants and contracts (including Davis-Bacon Act requirements for stimulus funds). Training materials will include easy-to-use assessment tools to evaluate your current approaches, updates on compliance requirements, and opportunities to learn from others how they are handling the greatest challenges in procurement.
Speaker:  Kay Sohl, PA, Kay Sohl Consulting

5D. The Art of Advocacy  Grand Ballroom B
CPE Field of Study: Specialized Knowledge  CPE Level: Overview
Involvement in public policy issues is a must for organizations working to improve the lives of low-income people. In this session, learn how to develop productive relationships with policymakers not just in visits to the legislator’s office, but also through site visits and events at your organization, as well as innovative coalition activities that create a positive visual impression of your mission, clients and programs. Also examine the rules that apply to lobbying by CAAs, Head Start programs, and 501(c)(3) organizations and find out how to advocate effectively within those rules.
Speakers:  Anita Lichtblau, Esq., CAPLAW
Ellen Teller, Esq., Food Research and Action Center
Region VIII Community Action Partnership commends the Community Action Program Legal Services, Inc. on its efforts to enhance and expand the legal capacity of the Community Action Partnership network. We anticipate that the 2009 CAPLAW National Training Conference will provide the legal guidance necessary to address the regulatory and compliance issues that confront the network during these historic and opportunistic times.

11:10 a.m. – 12:00 p.m.  Closing General Session: Weatherization Panel  Grand Ballroom C
Community Action Agencies and other Weatherization Assistance Program providers are ramping up for the additional $5 billion in stimulus funding. Explore the legal rules that apply to this funding and the practical issues in managing it.
Speakers:
Anita Lichtblau, Esq., CAPLAW
Meg Power, Economic Opportunity Studies; NCAF

Please don’t forget to fill out your Overall Conference Evaluation form and drop it off at the registration desk before leaving the conference.
The Community Action Partnership congratulates Anita Lichtblau and Winston Ross for their tremendous leadership and effectiveness with CAPLAW.

John W. Edwards, Jr., Board Chair,
Don Mathis, President & CEO
Community Action Partnership
Welcome to Washington State CAPLAW Conference Participants!

The thirty-one Community Action Agencies have received great benefit from our membership in CAPLAW and are thrilled that you came to our state to take home increased knowledge to add value to the work you do to allow families and individuals to become more self-sufficient.

www.wapartnership.org
Speaker Biographies

Keynote Speaker: Ronald Marlow
Assistant Secretary for Access and Opportunity in the Massachusetts Executive Office for Administration and Finance

Ron Marlow serves as the Assistant Secretary for Access and Opportunity in Massachusetts Governor Deval Patrick’s administration. In this role, Mr. Marlow is responsible for overseeing and coordinating efforts to ensure that all individuals, no matter their race, gender, ethnicity, sexual orientation or disability, have an equal opportunity to work for and contract with state government. Additionally, he is responsible for reviewing existing state programs, activities and policies to ensure that they are consistent with the goal of promoting nondiscrimination and equal opportunity. Finally, he has an ability to review existing state programs, activities and/or policies to identify if they unintentionally limit individuals’ efforts to transition from dependency to self-sufficiency.

Prior to taking on this position, Mr. Marlow served as Director of Governor Patrick’s Development Cabinet, where he worked to coordinate the efforts of the executive offices of Energy and Environmental Affairs, Housing and Economic Development, Labor and Workforce Development, and Transportation. In this position, Mr. Marlow played a leading role in helping to craft “The Springfield Partnership,” a blueprint for state engagement in efforts to revitalize the city of Springfield.

Mr. Marlow’s prior positions include: Chief Operating Officer at Dorchester Bay Economic Development Corporation, Chief of Staff to state Senator Dianne Wilkerson and Chief of Staff and Director of Community Services at the Boston Housing Authority.

Mr. Marlow has been very active in the Boston community. At present, he is the Vice-Chair of the Massachusetts Community Development Finance Corporation, a quasi-governmental agency whose mission is to provide suitable financing to businesses and community development organizations in Massachusetts to which adequate private capital is unavailable, with the purposes of creating or preserving jobs and promoting economic development or community revitalization in underserved or low-income communities throughout the Commonwealth. He is also a member of the Board of Directors of the Community Economic Development Assistance Corporation (or CEDAC), a quasi-governmental, community development finance institution that provides technical assistance, pre-development lending, and consulting services to non-profit organizations involved in housing development, workforce development, neighborhood economic development, and capital improvements to child care facilities.

He formerly served on the boards of: Action for Boston Community Development, Inc.; the Hispanic Office of Planning and Evaluation; the Private Industry Council; Project RIGHT; and the Quincy/Geneva Housing Corporation. He has been recognized by many organizations for his outstanding accomplishments; and in February 2001, The Boston Herald named Mr. Marlow as a “future Black history maker.”

He graduated from Northeastern University with a master of science and The Pennsylvania State University with a bachelor of arts. Mr. Marlow was born and raised in Boston. He, his wife and two children live in Randolph, MA.
Legislative Update Speaker: David Bradley  
Executive Director, National Community Action Foundation

Rarely has one individual had more impact on the fortunes of one program than David Bradley has on the nation’s 1100 community action agencies. For nearly three decades David Bradley has been recognized as one of Washington’s leading advocates for low-income programs. Mr. Bradley has worked with federal government representatives, members of Congress, congressional staff and key White House personnel to develop national policies dealing with low-income needs and related regulations and guidelines. David has served as a member on a number of advisory boards and commissions.

Since 1981, Mr. Bradley has served as Executive Director of the National Community Action Foundation (NCAF) which he helped found in 1981. NCAF is a private, non-profit advocacy organization that interacts with Congress, the Executive Branch, state and local governments and local agencies on behalf of a variety of low-income programs.

Mr. Bradley is the principal author of the Community Services Block Grant (CSBG). This three quarter of a billion dollar program provides the core funding to the nation’s community action agency (CAA) network. It is the essential funding which enables CAAs to leverage almost nine billion dollars in other federal, state, local and private resources. He wrote a major portion of the McKinney Act, which provides homelessness assistance to a wide variety of social service agencies.

He helped found and fund CAPLAW which provides a legal support system to this anti-poverty network and is widely credited with increasing the effectiveness of all partners, federal, state and local in the Community Services Block Grant network. David established CAP-PAC, the Community Action Program Political Action Committee. This allows community action programs to participate in a sophisticated manner in the political process. Recently Mr. Bradley helped create CAP Fund which is the first venture capital fund to be established to assist CAAs in their economic development activities.

Mr. Bradley’s most recent activities have been to meet with members of Congress and representatives of other countries who are interested in establishing a community action program in their countries. Libya, Russia and a number of Eastern Europeans countries have all expressed interest in having David help design a social service system that will empower low-income individuals seeking a way out of poverty.

Mr. Bradley has bachelors and masters degrees from George Washington University. In 1987 he was a Senior Executive Fellow at the Harvard University John F. Kennedy School of Government. He served in President Carter’s Administration as Congressional Liaison at the Small Business Administration. In his spare time, Mr. Bradley is a part owner of the Florida Marlins AAA baseball affiliate the Albuquerque Isotopes.

As a partner in the government relations firm of Moss McGee Bradley and Colbert, Mr. Bradley is intimately involved with the legislative affairs of federal programs totaling almost thirteen billion dollars and he is a frequent witness before the Congress.

Mr. Bradley continues to demonstrate an unusual ability to make issues affecting the poor of interest to both political parties. This was clearly demonstrated in 1995 and 1996 when the House Republican Contract with America agenda called for the elimination of funding for the CSBG. Mr. Bradley was able to turn that challenge into an opportunity to fully discuss the community action network. The result: Congress in 1996 gave the largest domestic increase in funding, some 100 million dollars to CSBG, a program that in 1995 was slated for elimination.

Although Mr. Bradley has been widely praised by leaders of both political parties, perhaps Sargent Shriver, the first leader in the War on Poverty said it best, “No one has done more to keep the War on Poverty alive and fresh in the minds of individuals.”
Jenae Bjelland is Director of Research at the National Association for State Community Services Programs (NASCSP). As Director of Research, Ms. Bjelland works with the states on all issues pertaining to CSBG-IS and ROMA. Before coming to NASCSP, she worked at a local Community Action Agency and at Oregon’s state CSBG office where she was the State CSBG and ROMA Program Coordinator. Ms. Bjelland is a certified National ROMA trainer and was a member of the National ROMA Peer to Peer Advisory Council.

Seth Hassett, M.S.W. is the director of the Division of State Assistance (DSA) within the Office of Community Services (OCS) in the Administration for Children and Families (ACF). Programs within the Division include the Community Services Block Grant, the Social Services Block Grant, and Empowerment Zones and Enterprise Communities. Mr. Hassett is a social worker with experience in health and human service program administration, policy, budget, as well as community planning and services. Prior to coming to ACF, he served in a variety of administrative and programmatic roles within the Substance Abuse and Mental Health Services Administration (SAMHSA). For several years, he managed large-scale disaster and traumatic response programs in partnership with the Federal Emergency Management Agency (FEMA). His responsibilities included oversight of the federal crisis counseling response to the September 11 terrorist attacks. Mr. Hassett began federal service in 1993 as a Presidential Management Intern (PMI). Prior to joining the federal government, he worked in a variety of community settings in direct service and planning roles. He holds an MSW from the University of California at Berkeley and a degree in psychology and history from Guilford College in Greensboro, North Carolina.

Ann Linehan serves as director of the Quality Assurance Division of the Office of Head Start. For over 25 years, she has worked in various capacities within Head Start, beginning as executive director at a Head Start and child care agency located outside of Boston, Massachusetts. In 1992, Ms. Linehan joined the federal government to work in Region I as the program manager for Head Start, focusing on the monitoring process to address key quality issues. Ms. Linehan earned her baccalaureate degree in sociology and psychology and her master’s degree in education from Boston State College.

Gil Sperling, Esq. serves as the program manager for the Office of Weatherization and Intergovernmental Program in the Office of Energy Efficiency and Renewable Energy at the U.S. Department of Energy (DOE). At DOE, Mr. Sperling has been charged with transforming legacy programs into current, market responsive efforts that support large scale energy efficiency and renewable energy projects. Prior to joining DOE he served as executive vice president and general counsel of Verdant Power, Inc., a company that generates electricity from the free flow of water in oceans, tidal areas, rivers and man-made waterways. His responsibilities included the company’s overall project and technology commercialization plan, corporate finance and all legal, regulatory and legislative issues. Mr. Sperling served in private practice for more than 20 years before joining DOE, providing regulatory, corporate, and finance related services for companies developing power and related energy projects in the U.S. and overseas. He received his B.A. from Dickinson College and his J.D. from New York University School of Law where he was a Root-Tilden Scholar.
Board Member Biographies

David Brightbill, CCAP is executive director of the Washington-Morgan Counties Community Action Agency, a two-county private nonprofit corporation based in Marietta, Ohio. Mr. Brightbill has been employed by the agency since 1970 and has served in a variety of capacities, including as youth coordinator, youth employment counselor, employment and training director, assistant executive director and, finally, as executive director since 1987. Mr. Brightbill is past president of the Ohio Association of Community Action Agencies (OACAA) and currently serves as OACAA's first vice president. He is also past chairman of the board of the Corporation for Ohio Appalachian Development. In addition to serving on the CAPLAW board, Mr. Brightbill serves on the boards of the Washington County Adult Basic and Literacy Education Program, the Washington County Community Improvement Corporation, the Washington County Revolving Loan Committee, the Muskingum Watershed Conservancy District, and the Ohio Community Development Corporation Association. He is president of the Washington County Family and Children First Committee and of the Lower Salem Village Council and is member of the Ohio Consumers Council Regional Advisory Committee and of the Ohio University Alumni Board. Mr. Brightbill holds a bachelor of science in education from Ohio University.

Robert M. Coard, a founder of CAPLAW, served as president of CAPLAW for 20 years, from its inception until 2009. He has served as president/CEO of Action for Boston Community Development, Inc. (ABCD) since 1968. ABCD is Boston's official antipoverty agency and the largest human services agency in New England, serving Boston-area residents through its central office and a decentralized neighborhood network of Area Planning Action Councils (APACs) and Neighborhood Service Centers (NSCs). ABCD programs include Head Start, day care services, fuel assistance, weatherization, career development, housing services, Child Care Choices of Boston, an alternative high school operated in collaboration with the Boston Public Schools, Foster Grandparents, health services, elder services, consumer services, advocacy and many other programs. From 1965 to 1968, as ABCD community action program director, Mr. Coard created the agency's decentralized APAC/NSC system. Earlier, he held managerial positions at the Boston Redevelopment Authority (BRA), the Urban League and the private sector. In the late 1960s, Mr. Coard was appointed by Judge Arthur Garrity to the 15-member Citywide Coordinating Council to advise on school desegregation during the school busing crisis. During his tenure at ABCD, Mr. Coard has built many significant institutions, including CAPLAW, the National Community Action Foundation, and the Urban College of Boston, a fully accredited two-year college that provides higher education opportunities to low-income Boston-area residents. Mr. Coard holds degrees from Dillard University and Boston University and has completed course work at the Massachusetts Institute of Technology for the Ph.D. program in city and regional planning. He also attended Harvard University's Littauer School of Public Administration and has received honorary degrees from Simmons College and Lesley University.

Leonard Dawson, JD, CCAP is executive director of the Coastal Georgia Area Community Action Authority, Inc. in Brunswick, Georgia, where he has worked for over 35 years. Mr. Dawson has led this agency to become the largest community based human service organization in the coastal area of Georgia. He has been active in the Community Action movement, having served as president of state, regional and national Community Action organizations and having been one of the founders of CAPLAW and the National Community Action Foundation. Mr. Dawson has also established the Institute for Human Service Development, Inc. and Dawson & Associates. Through these organizations he has developed three major programs that significantly impact Community Action and Head Start. The programs are Project Vote, War on Poverty Wall of Honor, and the War on Poverty Commemorative Training Conference. These programs are in operation today. Mr. Dawson has received many awards at all levels of the Community Action movement as well as awards for civic involvement at the local and state levels. He began his career as a self-employed businessman. Later he became president of the ILA #1832 local union in St. Mary's, Georgia. While serving in these positions he represented the low-income community on the Community Action board of directors. Mr. Dawson earned a bachelor of science from Edward Waters College and a doctor of jurisprudence from John Marshall Law School with special recognition for outstanding service.
Board Member Biographies

Gale F. Hennessy, CCAP, CAPLAW treasurer, is the executive director/CEO of Southern New Hampshire Services (SNHS), the Community Action Agency for Hillsborough County, the largest county in New Hampshire, consisting of the state’s two largest cities and 29 smaller communities. Mr. Hennessy has been involved with Community Action since 1966 and has been executive director/CEO at SNHS since 1976. He has been active in leadership positions in Community Action throughout his career. In addition to being a founding CAPLAW board member, Mr. Hennessy has served as the Region I representative to the board of the Community Action Partnership since 1978, as president of the New Hampshire Community Action Association since 1981, and has been active on the board of directors of the New England Community Action Association since 1976. Under his leadership, the New Hampshire Community Action Association has positioned the six New Hampshire CAAs to be a primary social service operator in New Hampshire. These CAAs operate the dislocated and adult titles of WIA, the statewide Welfare-to-Work program, WIC, CSFP, Head Start, Early Head Start, weatherization, fuel assistance, utility-funded energy assistance, homeless outreach, HOME rehabilitation programs, and have developed, own and operate over 200 units of subsidized housing. Mr. Hennessy attended the University of Florida, Emerson College and holds a B.A. from the University of New Hampshire.

Catherine Caputo-Hoskins, CCAP, CAPLAW secretary, has been executive director of the Salt Lake Community Action Program (SLCAP) for over 15 years. Ms. Hoskins is also a board member of of the National Community Action Foundation, and a member of the executive committee of the Community Action Partnership of Utah. She also belongs to numerous local advisory boards and civic committees. She began her Community Action career in 1965 and has devoted her entire working years to the visions and values of Community Action. First introduced as a Head Start parent, Ms. Hoskins has moved up SLCAP’s ranks as an organizer, neighborhood director, agency operations director, associate director and now as executive director. She also served for 10 years on the JTPA and the State Manpower Council. In the early 1970s when physicians were not accepting Medicaid cards, Ms. Hoskins was instrumental in the development of Salt Lake’s first community health center. As part of a team of neighborhood directors, SLCAP developed the concept of neighborhood community councils, which is still modeled and practiced in rich and poor neighborhoods. With the same team, SLCAP assessed the need and advocated for community centers in Salt Lake County’s poorest neighborhoods; these centers continue to be vital focal points for services and youth recreation. Ms. Hoskins’ special areas of interest are: health care for the medically underserved; employment opportunities for the unemployed and underemployed; and housing opportunities for the low-income population.

Douglas D. Rauthe is the president of the Region VIII Community Action Partnership which serves Montana, Colorado, Utah, North and South Dakota and Wyoming. He also previously served on the Region VIII board and will be hosting the Region VIII and X conference in 2009. Since 1994, Mr. Rauthe has been the executive director of Community Action Partnership of Northwest Montana, a multi-faceted Community Action Agency that serves four counties of northwestern Montana. Under his direction, the agency provides housing development, LIHEAP, in-home care, employment and training, business loans and many other programs to assist low-income people in achieving self-sufficiency. From 1990 to 1998, Mr. Rauthe was the mayor of the City of Kalispell, Montana and a member of the board of Montana League of Cities and Towns. Mr. Rauthe has served on the National Association of Community Action Agencies’ National Advisory/Planning Committee for the 2000 Dialogue on Poverty, as state coordinator for the original Dialogue on Poverty, on the National Task Force for the Annual Energy Consumers’ Alliance/National Consumers League Policy Development on Deregulation, and on numerous other boards and committees.

Winston A. Ross, ACSW, CCAP, CAPLAW president, is executive director of the Westchester Community Opportunity Program, Inc. Presently, he serves on the boards of the New York State Community Action Association, the New York Civil Liberties Union, the Westchester Residential Opportunities Program, AIDS Related Community Services, the Housing Action Council, and Westchester Public Health Education and Research, Inc. Mr. Ross is also past vice president of the National Association of Community Action Agencies and past president of the Yonkers Branch of the NAACP. In addition, he is also former chairperson of the New York State Social Work Board and past first vice president of the National Association of Social Workers. Mr. Ross has been recognized by many local organizations for his involvement in the community. In 1989, he received the NYS and National Social Worker of the Year Award. He received a bachelor of science from New York University and a master’s degree in social work from Columbia University.
Board Member Biographies

Patricia A. Steiger, CCAP Emeritus, CAPLAW vice-president, served as the executive director of Iowa East Central TR.A.I.N., a Community Action Agency in Davenport, Iowa for 35 years. After retiring from that position in 2002, Ms. Steiger became the director of the National Community Action Management Academy. She currently serves as a management consultant. While executive director of Iowa East Central T.R.A.I.N., Ms. Steiger served eight years on the National Association of Community Action Agencies (NACAAA) board of directors and four years as president. Ms. Steiger also served as president of the Iowa Community Action Association and of the Region VII Community Action Association. In addition to serving as a CAPLAW board member, Ms. Steiger currently serves as a member of the OCS Monitoring and Assessment Task Force. Ms. Steiger was the recipient of the Lyndon B. Johnson award in 1994.
Faculty Biographies

Merrily S. Archer, Esq. is of counsel in the Denver office of Fisher & Phillips LLP. She began her legal career as a trial attorney for the U.S. Equal Employment Opportunity Commission (EEOC) in Denver, Colorado. Since entering the private sector, Ms. Archer’s practice has focused on counseling, training and representing employers in a broad range of employment matters, including wage and hour, employee leaves of absence, trade secret protection, and discrimination and harassment claims. She has published several articles on employment topics and is a regular presenter for the Colorado Human Resource Association, CO-SHRM, the Council on Education in Management, the EEOC Training Institute, National Business Institute, and the Colorado Bar Association. She holds an M.S.W from Washington University, and is a graduate of the Washington University School of Law.

Sarah L. Bhagwandin, Esq. is an associate in the Seattle Washington office of Davis, Wright Tremaine LLP. Ms. Bhagwandin works with sponsors of health and welfare plans and provides counsel across a wide range of legal issues including COBRA and HIPAA compliance. She also counsels employers on the design, drafting and administration of executive compensation plans and tax-qualified retirement plans, and on legal issues including fiduciary duties, fiduciary liability, and ERISA 404(c) compliance. She is a graduate of Indiana University and Seattle University School of Law.

David H. Carleton is the founder and executive director of Kitchens With Mission, a nonprofit organization which works to train and employ individuals in community-oriented food service jobs. Mr. Carleton works as a catalyst for the growth, integration and replication of food-service based training and employment models rooted in social enterprise. He has over 14 years of broad management, business development and communications experience in publishing, media and Internet related fields. A long-time supporter of FareStart, a food service training program for the disadvantaged in Seattle, Mr. Carleton has applied this experience to shaping, developing and implementing FareStart’s communications, community relations and business development strategies. He has a B.A. from McGill University and a masters in communications from Northwestern University.

Teresa Cox has served as the executive director for Mid-Williamette Valley Community Action Agency for ten years. Prior to that, she was an operations manager for Adult and Family Services, Oregon Department of Human Services. Ms. Cox has over 25 years experience in the field of social services. Her educational background includes sociology, psychology, communications and business management. She has also served on the Department of Human Services Statewide Advisory Board, United Way Board, and Mt. Angel Area Habitat for Humanity Board. Ms. Cox currently serves on the board of the Community Action Partnership, the national association for Community Action agencies. She represents Oregon, Washington, Idaho and Alaska.

Cynthia Cumfer, J.D., Ph.D. has specialized in representing nonprofit groups for over 30 years. Her clients have included charities, social service organizations, educational organizations, immigrant and ethnic groups, quasi-governmental nonprofits, and advocacy groups. Dr. Cumfer has served as an adjunct professor of nonprofit law at Lewis & Clark Northwestern School of Law and of management issues for nonprofit professionals for the Lewis & Clark School of Public Administration. She is the co-author of The Oregon Nonprofit Corporation Handbook, including numerous chapters on nonprofit topics for lawyers on issues such as nonprofit boards and governance, tax exemption, lobbying and electioneering, international nonprofits, quasi-governmental organizations, and best practices for nonprofits. Dr. Cumfer is a graduate of Lewis and Clark Northwestern School of Law, and holds a Ph.D. in history from UCLA.

Peter L. Ebb, Esq. is a partner in the law firm of Ropes & Gray LLP in Boston, Massachusetts, where he specializes in labor and employment law, advising clients on day-to-day concerns and representing them in collective bargaining negotiations and in proceedings before state and federal courts and administrative agencies. Mr. Ebb also practices in the fields of public law and government affairs, where he advises clients on campaign finance and lobbying issues. He joined Ropes & Gray after clerking for the Honorable Herbert P. Wilkins of the Massachusetts Supreme Judicial Court. Prior to his clerkship, he worked in the Massachusetts legislature. Mr. Ebb serves as a trustee of the Urban College of Boston. He is a graduate of Harvard College and Boston University School of Law.

Eleanor A. Evans, Esq. is deputy director and senior counsel at CAPLAW, where she advises Community Action Agencies on a wide range of legal matters. She also makes presentations throughout the country and writes publications on legal issues of importance to CAA’s. Prior to joining CAPLAW, Ms. Evans practiced with the Boston law firm of Hill & Barlow, where she represented nonprofit and for-profit organizations in corporate, tax and employee benefits matters. Ms. Evans is co-author of "Being A Player: A Guide to the IRS Lobbying Regulations for Advocacy Charities," published by the Alliance for Justice. She is a graduate of Smith College and Georgetown University Law Center.
Faculty Biographies

Danna Fischer, Esq. is legislative director and counsel for the National Low Income Housing Coalition. Before joining the Coalition she was a senior director at Freddie Mac where she was responsible for the company’s relationship with the U.S. Department of Housing and Urban Development. Ms. Fischer got her start in housing policy as counsel to the Housing Subcommittee of the House Committee on Banking, Finance and Urban Affairs (now the House Committee on Financial Services). On the committee, she worked on a wide range of housing issues including the development of the HOME program, housing preservation, McKinney revisions, Section 8 reauthorizations and public housing.

Anita Lichtblau, Esq. serves as executive director and general counsel of CAPLAW and as general counsel of Action for Boston Community Development, Inc. (ABCD), Boston’s Community Action Agency. Ms. Lichtblau advises Community Action Agencies on issues such as tax-exempt organization requirements, lobbying and political activity rules, nonprofit board responsibilities, contracts, and Head Start and other government program requirements. She has presented numerous workshops on these topics across the country. Prior to her positions with CAPLAW and ABCD, Ms. Lichtblau was a senior trial attorney with the United States Department of Justice, prosecuting bank fraud in federal courts in New England. Ms. Lichtblau also previously practiced law with the Boston firm of Hill & Barlow, specializing in civil litigation, and the Washington, D.C. firm of Steptoe & Johnson, specializing in civil litigation and government contracts. She is a graduate of Cornell University and Harvard Law School.

Allison Ma’luf, Esq. is associate counsel at CAPLAW. She advises Community Action Agencies on a wide range of legal issues, including board responsibilities, Head Start, employment law, and tax-exempt organization law requirements. Prior to joining CAPLAW, Ms. Ma’luf practiced law as a corporate associate at Goodwin Procter LLP in Boston, Massachusetts and Troutman Sanders LLP in Atlanta, Georgia where she represented public and private companies and nonprofit organizations in general corporate matters. She also completed a two-year appointment to the Staff Attorney’s Office at the United Stated Court of Appeals, Eleventh Circuit. Ms. Ma’luf received her undergraduate and law degrees from Wake Forest University.

Dan Miller, CPA has been providing consulting services in financial management to Community Action Agencies across the country for the past seven years. Mr. Miller is currently CFO of Meliora Partners, the successor to the Peer-to-Peer and National Community Action Management Academy (NCAMA) programs of Mid-Iowa Community Action, Inc. (MICA). Previously, he served as a financial services specialist for MICA’s Peer-to-Peer program and as a fiscal trainer for NCAMA. Mr. Miller has special expertise in cost accounting systems and housing tax credits.

Ona Lara Porter, MA is the executive director of Community Action New Mexico where she leads initiatives among the eight agency network in the development and testing of high-impact strategies to end poverty. She is known for her powerful, no nonsense approach to problem solving and strategy development in such diverse fields as business, education, health and human services. Her tenacity to empower individuals and organizations to name and create the environments that lead to success may be measured by her oft stated remark, “Don’t tell me NO, tell me How!” A powerful speaker, Ms. Porter was educated at the University of California and Inter American University, and has for the last 35 years distinguished herself in the fields of business, education, health, and family and child advocacy. Her prolific endeavors as a researcher and writer, editor, and producer include such major works as Kids In Crisis: New Mexico’s Other Bomb, The Effects of Power and Powerlessness on Our Lives, First Things First: Caring for Preschool New Mexico, Discovering What Families Need, and From Here To There: The Workbook For Families On The Move. For five years Ms. Porter produced a TV program in Albuquerque on families called Impact New Mexico, and wrote a column, Family Matters, for relocation experts, Runzheimer International.

Meg Power, Ph.D. is president and executive director of Economic Opportunity Studies (EOS), a Washington, DC non-profit corporation that provides analysis, training, and support for Community Action Agencies and other organizations that offer low-income families and communities resources to become more self-sufficient. She manages the EOS Weatherization Partnership Project funded by the U.S. Department of Energy’s National Energy Technology Laboratory and the EOS Community Services Block Grant Information System Reporting project funded by the National Association for State Community Services Programs. Dr. Power also serves as a consultant to the National Community Action Foundation. In that capacity, she provides policy analysis and strategic support to the federal advocacy effort of the Community Action network. She holds a Ph.D. from the Massachusetts Institute of Technology and a B.A. from Radcliffe College in Harvard University.
Faculty Biographies

Ken Robinette has been the executive director of the South Central Community Action Partnership (SCCAP) in Twin Falls Idaho for nearly ten years. In 2006 SCCAP created a for-profit company, Home Energy Management LLC, to provide weatherization services for middle-to-upper income homeowners with the profits going to support SCCAP’s low-income weatherization program. Mr. Robinette has over 30 years of experience in Community Action and Weatherization. He was initially hired by SCCAP as a weatherization crew foreman. In that capacity, his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youths aged 16 to 18. He subsequently served as the Weatherization/Housing Rehab Director and was responsible for the administration and programmatic aspects of SCCAP’s weatherization and housing preservation programs.

Robert E. Sasser, Esq. is managing shareholder of Sasser, Sefton, Connally, Tipton & Davis, PC, a full-service law firm located in Montgomery, Alabama. Mr. Sasser serves as a consulting attorney for CAPLAW and as general counsel for the Montgomery Community Action Agency, the Community Action Association of Alabama, the Alabama Manufactured Housing Institute, the Alabama Water and Wastewater Institute, and the Alabama Retired State Employees Association. For over 25 years, Mr. Sasser has represented Community Action Agencies and their Head Start programs throughout the United States on a range of matters including corporate issues, employee relations, general litigation, and regulatory compliance, especially termination issues with the U.S. Department of Health and Human Services’ regional offices and before its Departmental Appeals Board.

Jeanne M. Schuster, Esq., CPA is an executive director at Ernst & Young LLP, concentrating in tax-exempt organizations. Her experience with tax-exempt organizations includes representation during IRS and state audits, including IRS CEP examinations, mergers and reorganizations of exempt and taxable corporations, applications for exempt status, unrelated business income tax, employment tax, information reporting and sales tax issues. Ms. Schuster is an adjunct professor at Suffolk University where she teaches a course on tax-exempt organizations. She is a member of the American, Massachusetts and Boston Bar Associations and is also a member of the Healthcare Financial Management Association’s Tax Committee. Ms. Schuster received a B.S. in accounting from Bentley College, a J.D. from the New England School of Law and an LL.M. from Boston University School of Law.

Norval D. (John) Settle, Esq. is president of SETTLEment Associates, LLC, a firm providing mediation, arbitration, conflict management training, and conflict coaching. He specializes in teaching managers how to avoid and cope with workplace conflict, how to build workforce trust, and personal negotiation skills. Mr. Settle is a member of the adjunct faculty for the George Washington University (GWU) Law School, teaching negotiation skills, and for GWU’s Center for Excellence in Public Leadership, where he teaches conflict management and other subjects. He served for many years as chairman of the Departmental Appeals Board at the U.S. Department of Health and Human Services, where he adjudicated hundreds of cases involving disputes under the Department’s health, public assistance, Head Start and other programs. Mr. Settle is the author of The Advocate’s Practical Guide to Using Mediation, Dewey Publications, Inc., and recently co-authored “A Perfect Storm: A Confluence of Problems in Organizational Team-Building”, in the Fall/Winter 2007 issue of AResolution. John received his bachelor’s degree from the University of Richmond, a master’s in public administration from the University of Southern California, and his J.D. from American University.

Jack B. Siegel, Esq., CPA provides consulting services to nonprofits through Charity Governance Consulting LLC. He focuses on board and staff training, governance manuals, financial management, record retention, and special projects. He is the author of A Desktop Guide for Nonprofit Directors, Officers, and Advisors: Avoiding Trouble While Doing Good (Wiley 2006), a comprehensive book addressing the legal, financial, tax, regulatory, and governance issues facing nonprofit boards and senior officers. He also maintains a highly-regarded blog, accessible at www.charitygovernance.com. Mr. Siegel holds an LLM in taxation from New York University and a master’s of management from Northwestern University.

Kay Sohl, PA is the principal of Kay Sohl Consulting. Ms. Sohl has over 30 years successful experience in providing consulting, training, and facilitation for nonprofit organizations, governmental entities, and corporate community engagement programs. She co-founded and served as executive director of TACS (Technical Assistance for Community Services), the Northwest’s largest resource for nonprofit capacity building assistance. She has provided leadership in the development of management support organizations throughout the Northwest, developing consulting and training services to address the challenges of management, governance, funding and planning in community based nonprofits. Ms. Sohl is co-author of The Oregon Nonprofit Corporation Handbook. She holds a B.A. from the University of California, Berkeley, and an M.A.T. from Reed College.
Faculty Biographies

Ellen S. Teller, Esq. is director of government affairs at the Food Research and Action Center (FRAC) in Washington, D.C. Ms. Teller serves as FRAC’s key liaison with national organizations, Congress, and its diverse state and local grassroots field network. She is responsible for lobbying on Capitol Hill for welfare reform, budget, appropriations, and authorization of the Federal food assistance programs. Ms. Teller played an essential role in the passage of the Child Nutrition and WIC Reauthorization Act of 2004. Before joining FRAC, she was a project director at the American Bar Association (ABA), where she directed the ABA Advisory Commission on Youth Alcohol and Drug Problems and assisted in the development of policies and strategies within the ABA. Ms. Teller received her J.D. from the Western New England College School of Law and is a member of the District of Columbia Bar.

Brian Tipton, Esq. is a shareholder in the Montgomery, Alabama, law firm of Sasser, Sefton, Connally, Tipton & Davis, P.C. Mr. Tipton’s practice is concentrated in the representation of nonprofits, including charitable organizations, private foundations, trade and professional associations, public utility boards, and Community Action Agencies and Head Start Programs. 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 to representing nonprofits in legal and regulatory disputes, Mr. Tipton consults with organizations on governance, human resources, programmatic, and corporate matters, and develops and presents training programs for nonprofits. Mr. Tipton is a summa cum laude graduate of both Louisiana State University and Cumberland School of Law of Samford University. 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.

LaVerne Woods, Esq. is a partner in the Seattle, Washington office of Davis Wright Tremaine LLP, where she practices primarily in the area of nonprofit and tax-exempt organizations and chairs the firm’s tax-exempt organizations group. Ms. Woods has over 20 years of experience in working with the nonprofit sector, and is a frequent writer and speaker in the area both nationally and regionally. Her practice spans a broad range of issues affecting charities, including federal tax exemption, governance, endowment management, mergers and joint ventures. She has a special interest in social entrepreneurship, healthcare, and international philanthropy. She is the author of numerous articles on exempt organization topics, including recent publications in The Exempt Organization Tax Review, Journal of Taxation and The Journal of Taxation of Exempt Organizations. Ms. Woods is a graduate of Yale University and Harvard Law School.

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