Strengthening Community Action
Through Expert Legal Resources & Education

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www.caplaw.org
National Training Conference
June 16-18 2010 SAVANNAH
Dedicated to Robert M. Coard

Conference Program
“Community action needs legal resources to stay alive, to thrive, to grow…”
ABCD President/CEO Bob Coard, speaking in 1989

AND SO CAPLAW WAS BORN!

ABCD congratulates CAPLAW for its important achievements providing legal support to community action programs and their low-income constituents.

We thank Robert M. Coard (1927-2009) for his cutting-edge creativity, unrelenting enthusiasm and tireless commitment to community action and the building of institutions that remain forever young, helping those in need to move up the ladder of economic opportunity.

Action for Boston Community Development, Inc.
178 Tremont Street, Boston MA 02111
(617) 357 - 6000
WWW.BOSTONABCD.ORG
Dear CAPLAW Conference Participants,

Welcome to the 2010 CAPLAW National Training Conference in Savannah! We are excited to welcome you back to the site of the 2003 National Training Conference as we explore the most pressing financial, management and legal issues currently facing the community action network. We hope you will enjoy the colorful city of Savannah while attending a collection of workshops led by nationally recognized attorneys, community action leaders and top officials from government agencies.

As your organization continues to face an ever-increasing array of rules and regulations, CAPLAW strives to supply the legal knowledge and tools necessary to sustain your organization and maximize available resources to the poor. The past year has been a year of growth for CAPLAW as we aim to broaden the extent of resources available to our members while continuing to respond to requests for legal assistance on issues significant to CAAs. Through training conferences such as this one, consultations, workshops and audio conferences, online resources and toolkits, e-newsletters, interactive training modules, the CAA Financial Network, various publications and the CAPLAW Legal Update newsletter, CAPLAW keeps you and your local counsel informed on the latest legal developments.

This year’s conference is particularly special as we dedicate it and pay special tribute to the memory of the late Robert M. Coard, recently retired President and CEO of Action for Boston Community Development, Inc. (ABCD) and founding President and board member of CAPLAW. For over 40 years Mr. Coard not only fought for the rights of Boston residents, but also for the rights of low-income individuals and families across the country. We are also pleased to welcome Bryan Stevenson, Executive Director of The Equal Justice Initiative, as this year’s Keynote Speaker, Yolanda Butler, PhD., Acting Director and Deputy Director of the Office of Community Services at the Administration for Children and Families, HHS and Ann Linehan, Director of the Quality Assurance Division of the Office of Head Start during our opening session. We will once again be joined this year by David Bradley, Executive Director of the National Community Action Foundation, during the closing session’s legislative update.

We hope you will leave this year’s conference with an enhanced understanding of the critical issues facing community action and obtain new ideas on how to use the law to effectively implement your goals.

Sincerely,

Winston A. Ross
President of CAPLAW

Anita Lichtblau
Executive Director/General Counsel

178 Tremont Street, Boston MA 02111-1093 ● Tel (617) 357-6915 ● Fax (617) 350-7899

Winston Ross, President ● Patricia Steiger, Vice President ● Gale F. Hennessy, Treasurer
Catherine Caputo Hoskins, Secretary ● Anita Lichtblau, Esq., Executive Director/General Counsel ● David Bradley, Coordinator
CAPLAW Board and Staff

Winston A. Ross, CAPLAW President
Executive Director, Westchester Community Opportunity Program
Elmsford, NY

Patricia Steiger, CAPLAW Vice President
Management Consultant and Former Executive Director,
National Community Action Management Academy

Gale F. Hennessy, CAPLAW Treasurer
Executive Director, Southern New Hampshire Services
Manchester, NH

Catherine Caputo Hoskins, CAPLAW Secretary
Executive Director, Salt Lake Community Action Program
Salt Lake City, UT

David Brightbill, CAPLAW Board Member
Executive Director, Washington–Morgan Counties Community Action Program
Marietta, OH

Leonard Dawson, CAPLAW Board Member
Executive Director, Coastal Georgia Area Community Action Authority, Inc.
Brunswick, GA

John J. Drew, CAPLAW Board Member
President and CEO, Action for Boston Community Development, Inc.
Boston, MA

Douglas D. Rauthe, CAPLAW Board Member
Executive Director, Community Action Partnership of Northwest Montana
Kalispell, MT

David Bradley, CAPLAW Coordinator
Executive Director, National Community Action Foundation
Washington, DC

Anita Lichtblau, Esq.
Executive Director and General Counsel

Eleanor Evans, Esq., Deputy Director and Senior Counsel
Allison Ma’luf, Esq., Associate Counsel
Bernadette Hood, Administrative Coordinator and Executive Assistant
Cara Loffredo, Communications Assistant
Brandan Still, Esq., Legal Fellow
## Conference-at-a-Glance

### Tuesday, June 15, 2010

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<tr>
<td>1:00 p.m.</td>
<td>Opening Session: Welcoming Remarks, Tribute to Robert M. Coard, Opening Speakers</td>
<td>Savannah A</td>
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<td>3:30 p.m.</td>
<td>Workshop Session One</td>
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<td>5:45 p.m.</td>
<td>Savannah Riverboat Cruise Networking Reception</td>
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<td>Savannah D &amp; E</td>
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<td>HR: Workplaces that Work: Positive People Management</td>
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<td>Fiscal: From the Auditor’s Desk - Taking a Proactive Audit Approach and Coping with Cost Principles</td>
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<td>2D.</td>
<td>Tapping into the Technology Wave</td>
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<td>2E.</td>
<td>Fast Fundraising Facts for Fame &amp; Fortune</td>
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<tr>
<td>12:00 p.m. - 1:40 p.m.</td>
<td><strong>Keynote Luncheon: Greetings from National Partners and Keynote Address by Bryan Stevenson</strong></td>
<td>Savannah A &amp; B</td>
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<td>2:00 p.m. - 3:30 p.m.</td>
<td><strong>Workshop Session Three</strong></td>
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<td>Governance: Governance When Everyone Is Watching: Internal Controls</td>
<td>Savannah C</td>
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<td>Governance: ABCs of CAA Bylaws</td>
<td>Savannah C</td>
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<td>4B.</td>
<td>HR: Keeping Good Time – Wage and Hour Law</td>
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<td>4C.</td>
<td>Fiscal: Managing Multiple Funding Streams</td>
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<td>4D.</td>
<td>Payroll Puzzles: The Davis-Bacon Act and Community Action</td>
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<td>4E.</td>
<td>Roadmap to Resources and Initiatives of the National Partner Organizations</td>
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### Friday, June 18, 2010

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<td>7:45 a.m. – 8:45 a.m.</td>
<td><strong>Continental Breakfast &amp; Roundtables</strong></td>
<td>Atrium &amp; Savannah B</td>
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<td>7:45 a.m. – 8:45 a.m.</td>
<td><strong>Attorney Network Breakfast</strong></td>
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<td>9:00 a.m. – 10:30 a.m.</td>
<td><strong>Workshop Session Five</strong></td>
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<td>5A.</td>
<td>Governance: Board and Staff Roles - The Invisible Yellow Line</td>
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<td>5B.</td>
<td>HR: A Measured Approach to Managing Union Impact</td>
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<tr>
<td>5C.</td>
<td>Fiscal: Tricks and Traps of the New Form 990 and Other 501(c)(3) Tax Tips</td>
<td>Savannah D</td>
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<td>5D.</td>
<td>Purely for Public CAAs</td>
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<td>5E.</td>
<td>Good for What Ails You: What Health Care Reform Means for Your CAA</td>
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<tr>
<td>10:45 a.m. – 12:00 p.m.</td>
<td><strong>Closing Session: Legislative &amp; Legal Update</strong></td>
<td>Savannah A</td>
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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

Please do not forget to fill out your Overall Conference Evaluation form and drop it off at the registration desk before leaving the conference!
Conference Schedule

Tuesday, June 15, 2010

3:00 p.m. – 5:00 p.m.  Registration & Information  Prefunction

Wednesday, June 16, 2010

8:00 a.m. – 5:30 p.m.  Registration and Information  Prefunction

8:00 a.m. – 12:15 p.m.  Pre-Conference Tour
Registration is required. Tour will leave from the main lobby.

8:30 a.m. – 12:00 p.m.  Pre-Conference Workshops
A. Making Money for Your Mission:  Savannah C
Revenue-Generating Ventures

Revenue-generating ventures by nonprofits are often referred to as “social enterprises” and reflect a developing trend that involves earned income activities that either directly advance an organization’s mission or simply serve to generate funds used to support an organization’s programs. These two approaches to social enterprise, which may be thought of as revenue-centered and mission-centered, will influence the nature of ventures a nonprofit pursues. In this session, you will learn about common forms of revenue-generating ventures and hear about nonprofits that have successfully established such ventures. You will also examine the practical, legal and tax issues that pose challenges to the nonprofit organization desiring to engage in a revenue-generating venture and review the structures that minimize risk to the nonprofit while maximizing rewards from the venture.

CPE Field of Study: Specialized Knowledge and Applications  CPE Level: Overview
Richard Dieter, Southwestern Pennsylvania Community Development Corporation
Stacey Flowers, Community Action Partnership
Timothy Phillips, Esq., American Cancer Society, Inc.
Howard Snyder, Northwest Side Community Development Corporation
R. Brian Tipton, Esq., Sasser, Sefton, Tipton & Davis, P.C.
Eleanor Evans, Esq., CAPLAW (Workshop Chair)

B. Personal Negotiation Skills for the Workplace  Savannah E

Critical to good leadership, effective relationships in the workplace, teamwork, and customer service are the skills and knowledge related to NEGOTIATION AND PERSUASION. This highly interactive session begins with basic principles and then moves into specific behaviors and techniques for: preparing to participate in negotiations – what to do “at the table”; achieving binding agreements; and dealing with impasse. Included is emphasis on negotiations with employees to achieve productivity in the workplace, and how to succeed in negotiations on behalf of your organization.

CPE Field of Study: Specialized Knowledge and Applications  CPE Level: Overview
Tracey Pilkerton Cairnie, CoreVision, LLC
Norval D. (John) Settle, Esq., SETTLEMENT Associates, LLC

1:00 p.m. – 3:00 p.m.  Opening Session: Welcoming Remarks, Tribute to Robert M. Coard & Opening Speakers  Savannah A

Welcoming Remarks from Winston Ross, CAPLAW President, Executive Director, Westchester Community Opportunity Program; Gale Hennessy & Patricia Steiger, CAPLAW Board Members and conference chairs; John Finney, Executive Director, Economic Opportunity Authority for Savannah-Chatham County Area; Dorothy Mabry, Special Assistant, ACF Region IV

Tribute to Robert M. Coard

Opening Speakers: Ann Linehan, Director of the Quality Assurance Division, Office of Head Start & Yolanda Butler, Ph.D., Acting Director & Deputy Director, OCS, ACF, HHS
Conference Schedule

Wednesday, June 16, 2010 (continued)

3:00 p.m. – 3:30 p.m.  
**Afternoon Break**  
Prefunction

3:30 p.m. – 5:00 p.m.  
**Workshop Session One**

1A. Governance: Developing a Comprehensive Risk Management Approach  
Savannah B

In the absence of a crystal ball, nonprofit organizations, like their business counterparts, must develop policies and procedures to effectively manage the risks that could create harm to their people, their property, their reputations and their viability. There is often a tendency to take a “headlines” approach to risk management – directing our energies toward protecting against a repeat of the latest crisis affecting a community or enterprise. But this front-page approach to risk management fails to provide practical solutions to the risks that impact an organization as a result of its day-to-day operations. This workshop will highlight an enterprise approach to risk management for the nonprofit organization. Attendees will receive practical tips and methods for developing a risk management program that is not only effective but also tailored to their particular organization’s structure and operations.

**CPE Field of Study:** Specialized Knowledge and Applications  
**Level:** Overview

Timothy Phillips, Esq., American Cancer Society, Inc.

1B. HR: The Anatomy of DISTRUST: Coping with Suspicion and Betrayal at Work  
Savannah E

Most of us recognize the importance of trust, and many have experienced the impacts of broken trust in the workplace. Distrust often leads to low morale, low productivity, negative behaviors, and a toxic work environment. As managers, supervisors and leaders, it is important to understand how trust is an essential precondition upon which all real success depends. This session will help you gain a better understanding of the meaning of trust and distrust, how to build trust, and especially, what you can do to rebuild when trust is broken.

**CPE Field of Study:** Personnel/HR  
**Level:** Overview

Tracey Pilkerton Cairnie, CoreVision, LLC  
Norval D. (John) Settle, Esq., SETTLEment Associates, LLC

1C. Fiscal: Beyond a Handshake: Contracts 101  
Savannah D

Once signed by all parties, contracts typically dictate a future collaboration or business arrangement. Don’t be controlled by a contract, rather take control before the ink hits the paper, negotiate the best deal for your organization, and secure a record of the deal that most accurately represents the current and future obligations agreed to by all involved. In this session, explore effective contract negotiation strategies and issues to consider when drafting contracts – such as which party should draft a contract when it is not clear who should do so, what to look for when reviewing a contract and key provisions to include or avoid. Also examine what steps to take when a contract has been breached.

**CPE Field of Study:** Specialized Knowledge and Application  
**Level:** Overview

Monica Scott Beckham, Esq., United Planning Organization

1D. Political Activity: Playing by the Rules  
Plaza

It’s another big election year. Be sure you’re up to speed on the rules that apply to political campaign activity by CSBG and Head Start grantees, 501(c)(3) organizations, and their employees and board members. Attend this session and familiarize yourself with Internal Revenue Service, CSBG, Head Start and Hatch Act requirements on political campaign activity and voter registration. Learn what, if any, impact Citizens United, the U.S. Supreme Court’s recent campaign finance decision, will have on CAAs and nonprofit organizations.

**CPE Field of Study:** Specialized Knowledge and Applications  
**Level:** Overview

Eleanor Evans, Esq., CAPLAW  
Brandan Still, Esq., CAPLAW
Wednesday, June 16, 2010 (continued)

1E. CSBG: The Federal Perspective

Get the scoop on the latest developments in the CSBG program from federal officials charged with overseeing it. Topics include: the Administration's current priorities and initiatives for the program; the status of the federal Office of Community Services' (OCS) CSBG risk assessment process, including training and technical assistance offered as part of that process; an update on issues surfaced by ARRA, including the appropriate use of CSBG funds; and insight into CSBG monitoring. We will also discuss some open policy issues currently being considered by OCS.

CPE Field of Study: Specialized Knowledge and Applications  Level: Update

Seth Hassett, M.S.W., Division of State Assistance, OCS, HHS
Jeffrey Polich, Esq., HHS Office of General Counsel
Marianna "Brandy" RayNor, Division of State Assistance, OCS, HHS
Anita Lichtblau, Esq., CAPLAW (Workshop Chair)

5:45 p.m. – 7:30 p.m.  Savannah Riverboat Cruise Networking Reception
Board beginning at 5:45 p.m. at 9 East River Street and sail at 6:15 p.m.

Thursday, June 17, 2010

7:30 a.m. – 5:30 p.m.  Registration & Information Prefunction
7:30 a.m. – 8:15 a.m.  Continental Breakfast Prefunction
8:30 a.m. – 10:00 a.m.  Workshop Session Two

2A. Governance: Putting Good Governance into Practice: Nonprofit Governance Case Studies

Explore the practical implications of nonprofit governance by participating in this interactive session. Participants will be divided into small discussion groups to address scenarios based on key governance areas including: board composition; for-profit ventures; executive director compensation; and the development and maintenance of communication channels. Each group will arrive at a solution for each case and share it with the session as a whole. Then, the workshop leaders will summarize the solutions and provide a brief presentation on best practices. Participants will be provided with a copy of the cases before the session so that they can familiarize themselves with the facts in advance. This is an opportunity to test your governance knowledge, express your opinions, meet other CAA and nonprofit leaders from around the country, and learn from the experiences of others.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Anita Lichtblau, Esq., CAPLAW
Patricia Steiger, CAPLAW Vice President, Management Consultant

2B. HR: Workplaces that Work: Positive People Management

In most workplaces there is at least one disgruntled employee who is unreliable, unwilling to accept direction, behaves badly, bends the rules and is full of excuses, excuses, excuses! Don’t let the bad attitude of one or two sour apples taint the whole batch! Rather, learn how to make apple pie with that seemingly rotten fruit! Attend this workshop to discover positive ways to grapple with the negative employees in your workplace. This session focuses on the legal compliance issues associated with creating a positive work environment, avoiding hostile ones and instituting productive ones. We will discuss some practical tips related to how supervisors can effectively motivate, evaluate and manage employees – even the most difficult ones – while simultaneously developing and maintaining a positive, legally compliant rapport with those they supervise.

CPE Field of Study: Personnel/HR  Level: Overview

Merrily S. Archer, Esq., Fisher & Phillips, LLP
### Conference Schedule

**Thursday, June 17, 2010 (continued)**

#### 2C. Fiscal: From the Auditor’s Desk - Taking a Proactive Audit Approach and Coping with Cost Principles  
*Plaza*

In this two-part session, get practical advice from experienced auditors on preparing for your organization’s audit and complying with federal cost principle circulars. In Part I, our presenters will share tips and tools – including sample audit planning schedules and questionnaires – to help you make your organization’s next audit more efficient and to reduce future audit costs. They will also discuss the impact of ARRA requirements on the OMB Circular A-133 audit process and offer insights on audits of employee benefit plans, including 403(b) plans. In Part II, they will use CAPLAW’s annotated guide to OMB Circular A-122 not only to review the plain language of individual cost principles, but also to apply them in combination to especially tricky issues faced by grantees. Among the topics to be discussed in this part are: facilities expenses, donations and contributions, including in-kind and fundraising costs.

**CPE Field of Study**: Auditing  
**Level**: Overview

*Mary Pockl, CPA, S.R. Snodgrass A.C.*  
*Michael Zeno, CPA, S.R. Snodgrass A.C.*

#### 2D. Tapping into the Technology Wave  
*Academy*

The ever-expanding world of information technology (IT) and the web offers CAAs the opportunity to increase their scope and effect in exciting, innovative ways. However, the legal implications of tapping into this often uncharted area can seem daunting. This workshop will not only dispel fears associated with using the Internet and various technologies but also offer practical feedback from those who have ventured into this new frontier. We will also cover: legal implications of using social media; tips on e-mail and Internet usage policies; complying with tax and charitable solicitation rules when using websites for development and fundraising purposes; intellectual property issues associated with the web; and other related topics.

**CPE Field of Study**: Specialized Knowledge and Applications  
**Level**: Overview

*Dr. Joyce J. Dorsey, Fulton Atlanta Community Action Authority, Inc.*  
*Sherry Heyl, Concept Hub, Inc.*  
*Jessica E. Margolin, Esq., Ropes & Gray LLP*  
*Colin A. McRae, Esq., Hunter Maclean Exley & Dunn, P.C.*  
*Allison Ma’luf, Esq., CAPLAW (Workshop Chair)*

#### 2E. Fast Fundraising Facts for Fame & Fortune  
*Mercer*

This fast-paced workshop addresses ways that community action agencies (CAAs) can diversify their funding and take advantage of revenue sources other than traditional grants. Attend and find out how to connect effectively with corporate and individual donors, try special events and more. Discuss ways to ask successfully and to implement Jean’s 10 Rules for Fundraising Success, including how to handle a “no” (hint: It’s no big deal). This session will feature practical insight from the CAA perspective along with a brief discussion of the legal requirements related to fundraising. Taught by a nonprofit pro with nearly 50 years experience as staff and volunteer, a CAA planning director and an experienced nonprofit attorney, this workshop will motivate and inspire you to put the FUN unto FUNdraising!

**CPE Field of Study**: Specialized Knowledge and Applications  
**Level**: Overview

*Jean Block, Jean Block Consulting, Inc.*  
*Christina Sieber, Action for Boston Community Development, Inc.*  
*Rachel Spears, Esq., Pro Bono Partnership of Atlanta*  
*Eleanor Evans, Esq., CAPLAW (Workshop Chair)*

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**10:00 a.m. – 10:15 a.m.**  
**Morning Break**  
**Prefunction**

**10:15 a.m. – 11:45 a.m.**  
**Workshop Session Two continued**

**12:00 p.m. – 1:40 p.m.**  
**Keynote Luncheon: Greetings from National Partners and Keynote Address by Bryan Stevenson**  
*Savannah A & B*  

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Workshop Session Three

3A. Governance: Governance When Everyone Is Watching: Internal Controls

New federal dollars have arrived in the form of stimulus funds. Whether it’s CSBG, Weatherization, Head Start, or a host of other federal programs, CAAs and other federal grantees have received significant increases in funding. New funding brings additional scrutiny and governance responsibilities have increased accordingly. Internal controls are key to assuring those outside your organization that all funds are secure. If you are a non-fiscal type with governance responsibility, attend this session to develop a better understanding of what internal controls are, how to implement them and what your role is in that process.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Dan Miller, CPA, Meliora Partners

3B. HR: Cutting Edge Issues in Employment Law

This workshop will provide an overview of new employment laws, as well as recent changes to existing ones, that are likely to impact your organization. Topics will include the most recent revisions to the Family Medical Leave Act (FMLA), the new health care reform law, the Genetic Information Nondiscrimination Act (GINA), the Lilly Ledbetter Fair Pay Act, the new Form I-9 and E-verify requirements, and cases interpreting the Americans with Disabilities Act, as amended in 2009. This workshop will provide an overview of new employment laws, as well as recent changes to existing ones, that are likely to impact your organization.

CPE Field of Study: Business Law  Level: Update

Jessica E. Margolin, Esq., Ropes & Gray LLP

3C. Fiscal Sponsorship: Making the Right Connections

CAAs often offer support to other groups and endeavors sharing a similar charitable mission by accepting and managing funds on their behalf and, in some cases, by providing other administrative and management services. Many refer to the CAA’s role in these relationships as that of a “fiscal agent,” a “pass-through,” or a “conduit.” Find out why “fiscal sponsorship” is a more appropriate term and learn how to structure fiscal sponsorship arrangements to avoid scrutiny by the IRS and state charity regulators and to reflect what is actually occurring.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Rachel Spears, Esq., Pro Bono Partnership of Atlanta

3D. Expand Your Reach with Reporting

Learn ways to transform the required reporting for your various CAA programs into dollar signs. This workshop begins with an overview of federal, state and local reporting requirements associated with a CAA’s major funding sources, including ARRA, and a discussion of how a CAA can efficiently and effectively meet those requirements. It then goes a step further to offer practical and proven methods for applying the data used to meet these requirements not only to sustain current funding sources but also to attract those highly coveted private funds.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Tabitha A. Beck, National Association for State Community Services Programs (NASCSP)
Marjorie Lombard, Action for Boston Community Development, Inc.
Christina Sieber, Action for Boston Community Development, Inc.
Douglas Rauthe, CAPLAW Board Member, Executive Director, Community Action Partnership of Northwest Montana (Workshop Chair)
3E. Head Start Hot Topics  
Be sure you’re up to speed on the latest developments affecting your organization’s Head Start program. This session will feature a lively discussion of the impact of ARRA on Head Start grantees; issues related to reauthorization, including the status of the re-designation process and of regulations interpreting the reauthorized Head Start Act; monitoring trends and issues in the wake of reauthorization; and changes to the National Training and Technical Assistance System. A dialogue on Head Start facilities issues will round out the agenda.

CPE Field of Study: Specialized Knowledge and Applications  
Level: Update

Ann Linehan, HHS Office of Head Start
Robert Sasser, Esq., Sasser, Sefton, Tipton & Davis, P.C.
R. Brian Tipton, Esq., Sasser, Sefton, Tipton & Davis, P.C.
Catherine Caputo Hoskins, CAPLAW Secretary, Executive Director, Salt Lake Community Action Program (Workshop Chair)

3:30 p.m. – 4:00 p.m.  
Afternoon Break Prefunction

4:00 p.m. – 5:30 p.m.  
Workshop Session Four

4A. Governance: ABCs of CAA Bylaws  
Clear, authoritative, and up-to-date bylaws are a cornerstone of good governance. Examine the main issues to look at when reviewing and updating your CAA’s bylaws. Find out how to comply with the CSBG and Head Start board composition requirements. Get answers to questions such as: How do an organization’s bylaws relate to its articles of incorporation, board resolutions and agency-wide policies? What provisions should CAAs have in their bylaws? How should CAA bylaws deal with issues such as board size, term limits and conflicts of interest? Participants will receive a copy of CAPLAW’s recently updated Bylaws Toolkit, which includes sample CAA bylaws language.

CPE Field of Study: Specialized Knowledge and Applications  
Level: Overview

Eleanor Evans, Esq., CAPLAW

4B. HR: Keeping Good Time – Wage and Hour Law  
Brush up on the basics of the federal Fair Labor Standards Act (FLSA), take a practical look at common wage and hour compliance issues facing nonprofits and government employers and discover ways to reduce wage and hour law liability. In this session, you will learn how to categorize workers as employees vs. independent contractors and employees as exempt vs. nonexempt and get answers to questions such as: How do you calculate minimum wage and overtime pay? How do you compute hours worked? What records are employers required to keep under the FLSA? You will also examine the salary basis requirement for exempt employees – what it means to pay an employee on a salary basis and how to avoid impermissible deductions that can jeopardize the salary basis of an employee’s pay.

CPE Field of Study: Business Law  
Level: Overview

Lawrence S. McGoldrick, Esq., Fisher & Phillips, LLP

4C. Fiscal: Managing Multiple Funding Streams  
CAAs receive funding from a wide variety of sources, many of which have varying requirements and program years. Effective financial management of multiple funding streams involves more than tracking profit and loss segregated by fund. Budgeting and providing cash flow information to management and the governing board are key. In this workshop, discuss the challenges CAAs face in managing funds from multiple sources and learn about effective strategies for addressing those challenges and keeping your organization’s finances on track.

CPE Field of Study: Specialized Knowledge and Applications  
Level: Overview

Marjorie Lombard, Action for Boston Community Development, Inc.
Dan Miller, CPA, Meliora Partners
### Conference Schedule

**Thursday, June 17, 2010 (continued)**

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<tr>
<th>Time</th>
<th>Session Title</th>
<th>Location</th>
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<tr>
<td>4D. Payroll Puzzles: The Davis-Bacon Act and Community Action</td>
<td>Mercer</td>
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<td>9:00 a.m. – 10:30 a.m.</td>
<td>Discussion of the latest Davis-Bacon Act (DBA) issues relating to Head Start and the Weatherization Assistance Program (WAP). This session will briefly review the DBA and its application to Head Start facilities projects and to WAP projects funded with ARRA monies. Scenarios addressing different DBA issues will be presented and resolutions will be discussed. Participants are encouraged to bring their DBA questions and concerns.</td>
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<td>CPE Field of Study: Specialized Knowledge and Applications</td>
<td>Level: Overview</td>
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**Richard (Rick) W. Pins, Esq., Leonard, Street and Dienard**  
**Allison Ma’luf, Esq., CAPLAW (Workshop Chair)**

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<th>Time</th>
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<td>4E. Roadmap to Resources and Initiatives of the National Partner Organizations</td>
<td>Academy</td>
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<tr>
<td>9:00 a.m. – 10:30 a.m.</td>
<td>The national CSBG-network partner organizations are here to serve you. They have established initiatives to further the anti-poverty goals of the CSBG Act and developed an abundance of resources to help CAAs and state CSBG offices fulfill their missions. Attend this workshop and get the information you need to join the initiatives, navigate the websites, sign up for the newsletters, access the resource materials and participate in the audio conferences, workshops, listservs and blogs offered by the national partner organizations.</td>
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<td>CPE Field of Study: Specialized Knowledge and Applications</td>
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**Jeannie Chaffin, National Association for State Community Service Programs (NASCSP)**  
**Lindley (Lil) Dupree, Community Action Partnership**  
**Cara Loffredo, CAPLAW (Workshop Chair)**

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**Friday, June 18, 2010**

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<tr>
<th>Time</th>
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<td>7:45 a.m. – 12:00 p.m.</td>
<td>Registration &amp; Information</td>
<td>Prefunction</td>
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| 7:45 a.m. – 8:45 a.m. | Continental Breakfast & Roundtables | Atrium & Savannah B  
See flyer in conference bag for topics & locations. |
| 7:45 a.m. – 8:45 a.m. | Attorney Network Breakfast | Mercer           
Discussion on current legal issues for attorneys working with CAAs |
| 9:00 a.m. – 10:30 a.m. | Workshop Session Five | Savannah C       |
| 5A. Governance: Board and Staff Roles - The Invisible Yellow Line | Savannah C       |
| 9:00 a.m. – 10:30 a.m. | You know how that yellow line appears on the screen when you watch football? It marks the goal, a first down – and it keeps moving! Sitting in front of the TV at home, the line is perfectly visible, but to the players on the field, it’s invisible. In football, without careful planning before each play and communication during the play, it can be hard for the players to know what each is supposed to do to reach the goal. This workshop will explore who does what – how staff and board volunteers can successfully work together as partners to advance the mission and programs of your organization. Whether it’s planning, human resources, budgeting, fundraising or management – we’ll discuss who should do what and how to keep lines of communication open. Taught by a nonprofit pro who has been on both teams – as board and staff leader – and who will entertain and inspire. | Savannah C |
| CPE Field of Study: Specialized Knowledge and Applications | Level: Overview |

**Jean Block, Jean Block Consulting, Inc.**
5B. HR: A Measured Approach to Managing Union Impact

In the face of a difficult economy, prevailing wage requirements, widespread discussion of the Employee Free Choice Act (EFCA), and heightened efforts by union organizers, CAAs must work as hard as ever to foster positive employee relations, which are essential for managing the impact of unions on the workplace. This workshop will focus on fostering those relations in such a way as to make the option for unionizing your workers a less engaging one. It will also cover how an employer should conduct itself when faced with union organizing efforts (including complying with the special constraints imposed on CAAs by the Head Start Act and similar state laws) and offer an update on the current status of the EFCA.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Richard (Rick) W. Pins, Esq., Leonard, Street and Dienard

5C. Fiscal: Tricks and Traps of the New Form 990 and Other 501(c)(3) Tax Tips

You know how to fill out the new Form 990, been there, done that! However, did your organization fight an uphill battle to complete the form? Was it a struggle to collect the correct information? Bring your war stories to this session and find out how to assemble the information the Form 990 is asking for so that you can more easily and adeptly complete next year’s form. This session will also review the nuances of the Form 990-T (the tax form required for reporting unrelated business tax income) and address other 501(c)(3) tax topics such as the special tax concerns raised by employer provided cell-phones and the implications of the IRS’s governance guidelines.

CPE Field of Study: Tax  Level: Update

Jeanne Schuster, Esq., CPA, Ernst & Young LLP

5D. Purely for Public CAAs

Public community action agencies (CAAs) face unique opportunities and obstacles in operating their programs. Explore the relationship between a public CAA’s tripartite board and staff and the local government entity of which it is a part. In particular, analyze the authority delegated to the CAA, the role of the tripartite board, and the ways in which a public CAA can fulfill the goals of the Community Services Block Grant Act.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Lois Carson, California Riverside Community Action Agency
Anita Lichtblau, Esq., CAPLAW

5E. Good for What Ails You: What Health Care Reform Means for Your CAA

Earlier this year, Congress passed and President Obama signed into law what is now commonly known as the Affordable Care Act. The Act makes sweeping changes to the American health care landscape and has impacts for government, employers and individuals. In this session, you will learn about the impact of health care reform on your CAA including a review of the immediate and short-term impacts, what steps you need to take now, and what to watch for in the future.

CPE Field of Study: Specialized Knowledge and Applications  Level: Overview

Edward I. Leeds, Esq., Ballard Spahr LLP

10:45 a.m. – 12:00 p.m.  Closing Session: Legislative Update with David Bradley, NCAF and Legal Update with Anita Lichtblau, Esq., CAPLAW

Savannah A

CAPLAW National Training Conference | 15
Keynote Speaker: Bryan Stevenson, Esq.
Executive Director, Equal Justice Initiative

Bryan Stevenson is the Executive Director of the Equal Justice Initiative in Montgomery, Alabama and also Professor of Law at the New York University School of Law. His representation of poor people and death row prisoners in the Deep South has won him national recognition. He and his staff have been successful in overturning dozens of capital murder cases and death sentences where poor people have been unconstitutionally convicted or sentenced. Mr. Stevenson has been recognized as one of the top public interest lawyers in the country. His efforts to confront bias against the poor and people of color in the criminal justice system have earned him dozens of national awards including the National Public Interest Lawyer of the Year, the ABA Wisdom Award for Public Service, the ACLU National Medal of Liberty, the Reebok Human Rights Award, the Olaf Palme Prize for International Human Rights, the Gruber Foundation International Justice Prize and the prestigious MacArthur Foundation Fellowship. He is a graduate of Harvard Law School and the Harvard School of Government. He has published articles on race and poverty and the criminal justice system, and manuals on capital litigation and habeas corpus.

Opening Session: Yolanda J. Butler, Ph.D.
Acting Director and Deputy Director, OCS
Administration for Children and Families, HHS

Dr. Yolanda J. Butler currently serves as Acting Director of the Office of Community Services (OCS) at the Administration for Children and Families, U.S. Department of Health and Human Services (ACF/HHS). As Acting Director of OCS since November 2008, and Deputy Director of OCS since April 2006, Dr. Butler serves as an executive manager and advisor for nine highly visible block grant and discretionary community and social services grant programs (including one Presidential initiative program) that total some $8 billion. Prior to her positions in OCS, Dr. Butler served as a senior advisor on legislative, regulatory and budget policy in the Office of Legislative Affairs and Budget where she worked on key social services and community programs, and advised political and career staff for OCS and the Administration on Developmental Disabilities. She also spent time working with then-Senator Carol Moseley-Braun of Illinois on human services and economic development issues in 1998 and 1999. Dr. Butler also has a long-standing association with OCS, having entered federal service in 1996 as a Presidential Management Intern in OCS.

Dr. Butler received a doctorate in Political Science (concentrating in American Government and Public Administration) from Howard University, where she also earned her master’s degree in American Government and Public Administration. She most recently received a certificate from the Key Executive Leadership Program in Public Administration from American University in 2008. She is a graduate of the W.E.B. DuBois Honors College at Jackson State University (JSU).
Speaker Biographies

**Opening Session: Ann Linehan**  
*Director of the Quality Assurance Division of the Office of Head Start*

Ann Linehan currently serves as Director of the Quality Assurance Division of the Office of Head Start. For over 25 years, Ann Linehan 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.

**Opening Session: John H. Finney**  
*Executive Director, Economic Opportunity Authority of Savannah-Chatham County Area*

John H. Finney is the Executive Director of the Economic Opportunity Authority (EOA) of Savannah-Chatham County Area, Inc. Established in 1964, EOA is a non-profit Human Services Agency that is an invaluable resource to residents of the Savannah-Chatham County Area. As Executive Director of EOA, Mr. Finney is responsible for the agency’s budget of over $12 million dollars and approximately 250 employees. Mr. Finney has worked in the area of human services for over 40 years. Mr. Finney earned a bachelor of science degree in sociology from Savannah State University, and a masters of social work from Atlanta University. He also received training in the area of Management and Executive Leadership from Harvard University’s Business School in Cambridge, MA.

Mr. Finney has served as Vice President of the Voluntary Action Center, Secretary of the United Way of the Coastal Empire, and was a member of the State Outreach Committee of the Morehouse College School of Medicine. Mr. Finney also served on the Boards of the Girl Scouts Council, Salvation Army, Rape Crisis Center, Savannah Speech and Hearing and the Armstrong-Savannah State College Social Work Consortium. He currently serves on committees and boards to include the: Savannah Branch of the NAACP, Youth Futures Authority Collaborative, Savannah Development and Renewal Authority, Sickle Cell Association of Savannah and serves as Chair of the Curtis V. Cooper Health Board of Directors.

**Opening Session: Dorothy Mabry**  
*Special Assistant, Administration for Children and Families Region IV*

Dorothy Mabry serves as Special Assistant to the Southeast Regional Administrator for the U.S. Department of Health and Human Services/Administration for Children and Families (ACF) and Program Manager for the Special Initiatives Branch. The Branch provides guidance and technical assistance for the Healthy Marriage, Faith-based and Community-based Initiatives. The southeast region includes 8 states and provides federal oversight for a wide variety of programs impacting children and families, including Head Start, TANF, Child Welfare, Child Care and Child Support Enforcement. Ms. Mabry provides leadership and direction for specific work-related activities for the accomplishment of the Regional Administrator and ACF priorities. She has lead responsibility for several collaborative initiatives and serves as the regional liaison for external groups, such as governors and cabinet staff, state human services commissioners, legislators, advocacy, community organizations and the media.
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. He 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. He has also 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 also wrote a major portion of the McKinney Act, which provides homelessness assistance to a wide variety of social service agencies.

Mr. Bradley 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. He established CAP-PAC, the Community Action Program Political Action Committee. This allows supporters of community action programs to participate in a sophisticated manner in the political process. Recently he 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 a bachelors and masters degree 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, Mr. Bradley is intimately involved with the legislative affairs of federal programs totaling almost 13 billion dollars and he 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.”
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. He is a 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 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.

Patricia A. Steiger, CCAP Emeritus, CAPLAW Vice President, served as the Executive Director of Iowa East Central T.R.A.I.N. (now Community Action of Eastern Iowa), 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 and the board of directors of the National Community Action Foundation (NCAF). Ms. Steiger was the recipient of the Lyndon B. Johnson award in 1994.

Gale F. Hennessy, CCAP, CAPLAW Treasurer, is the Executive Director 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 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 primary social service operators 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 and 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 the National Community Action Foundation, and a member of the executive committee of the Community Action Partnership of Utah. She 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

(continued on next page)
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 under served; employment opportunities for the unemployed and underemployed; and housing opportunities for the low-income population.

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 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 a 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.

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.

John J. Drew, President and CEO of Action for Boston Community Development, Inc. (ABCD), has been a national figure in the community action movement for over 35 years. His leadership in the field has been informed both by his personal experience and his professional training. Mr. Drew was born in Charlestown, Massachusetts, and his early years were marked by the challenges of growing up in a hard-working community in which opportunities for education and career advancement were few. As a resident of public housing and a Head Start parent, he saw the beginnings of the anti-poverty movement of the 1960s. An academic late bloomer, he matriculated at Bentley College in his mid-30’s, and went on to complete his MBA at Suffolk University. After
being licensed as a Certified Public Accountant, Mr. Drew first encountered Action for Boston Community Development as an auditor. Mr. Drew joined ABCD as Budget Director, subsequently served as Deputy Director, Executive Vice President and is now the agency’s President and CEO. During this time ABCD’s budget grew to over $100 million dollars, and its services reached out to more than 100,000 disadvantaged individuals each year. In addition to helping guide the growth of ABCD, Mr. Drew rapidly emerged as a leader in the wider nonprofit arena. He is the founder and former President of the National Association for Administrative Excellence (NAFAE), an association that helped make significant advances in the business management of nonprofit agencies. He is a sought-after trainer and consultant, who lectures frequently to national audiences in the community action network. As an adjunct professor at local colleges and universities including the Urban College of Boston, Mr. Drew shares his combination of practical expertise and academic learning with a range of students in public management programs. Mr. Drew has continued to support the principle of wider access to higher education, helping to nurture the Urban College Program at ABCD and serving as a Trustee of the Urban College of Boston since 1998.

Douglas D. Rauthe is 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. In addition, Mr. Rauthe is 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 hosted the Region VIII and X conference in 2009. 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.

In Appreciation

CAPLAW would like to thank John Finney, Executive Director of the Economic Opportunity Authority for Savannah-Chatham County Area and his staff for their assistance in facilitating the pre-conference tour and for providing volunteer services for the conference.
Merrily S. Archer, Esq., M.S.W., 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.

Tabitha A. Beck is a Data Analyst at the National Association for State Community Services Programs (NASCSP), where she also serves as CSBG Regional Specialist for Regions 6, 8, 9, & 10. She has a bachelors in math from Colgate University and a masters in public policy from George Mason University.

Monica Scott Beckham, Esq., is General Counsel of United Planning Organization (UPO), the community action agency for Washington, D.C. UPO’s extensive network of agencies, organizations and special programs provides core services in neighborhoods throughout the District of Columbia. These services include specialized hotlines and transportation, youth services, weatherization training, phlebotomy and dietary aide training, child care services, substance abuse treatment and counseling, services for homeless families, energy programs and housing initiatives. UPO directly operates four community service centers and 17 early childhood development centers. UPO also provides funding for four delegate agencies that provide services to its local communities; eight community-based initiatives that provide specialized unique services to District residents in all wards of the city; four Head Start delegate agencies and four slot purchase centers; plus a number of other programs and services. For over 25 years, Ms. Beckham has represented and advised UPO on a range of legal matters including corporate issues, general litigation, labor and employment, contracts, and real estate development. She is a graduate of Howard University Law School and Howard University School of Fine Arts.

Jean Block is President of Jean Block Consulting, Inc. Ms. Block organized her first fundraiser when she was 13, and was hooked! In the 50+ years since then, she has served in leadership positions as volunteer and staff for numerous local, regional and national nonprofits. She is now a national speaker, trainer and consultant on nonprofit management, fundraising, board development and governance, and social enterprise. She is based in Albuquerque, New Mexico and has written two nonprofit books: Fast Fundraising Facts for Fame & Fortune and The ABCs of Building Better Boards. In 2006, she co-founded Social Enterprise Ventures, LLC, a national training company that teaches nonprofits how to diversify revenue through earned income. Visit her two websites to learn more and sign up for her free informational newsletters, www.jblockinc.com and www.socialenterpriseventures.com.

Tracey Pilkerton Cairnie, MS, ACC is the President of CoreVision, LLC, a woman-owned small business specializing in conflict analysis and resolution, coaching, and communication processes. Ms. Cairnie is a court certified mediator/mentor, facilitator, trainer, coach, and public participation specialist. Ms. Cairnie has over 20 years experience in developing and implementing a variety of communication and alternative dispute resolution programs. Ms. Cairnie works closely with her clients in assessing conflict situations and designing strategies to optimize organizational and individual effectiveness. She facilitates interest-based dialogues (workplace, community, family), provides coaching (one-on-one, team, couples), and designs and implements public outreach programs for a variety of environmental and transportation projects. Her clients include government agencies (federal, state and local), businesses (profit and non-profit), educational institutes, communities, families, and individuals. As an adjunct professor at George Mason University, Ms. Cairnie teaches mediation, collaborative communication, negotiation and conflict theory. She also provides specialized training in leadership development, conflict management, workplace coaching and mentoring, solution oriented problem-solving, and effective relationship awareness. Ms. Cairnie holds a MS in conflict analysis and resolution, a BS in public administration, and is a graduate of the Georgetown University Executive Leadership Coaching Program. She is ACC-certified by the International Coach Federation.
Lois Carson has served for 30 years as the Executive Director of Community Action Partnership of Riverside County (CAP Riverside). She promoted an anti-poverty vision on state and national levels as President of the California-Nevada Community Action Partnership Association (Cal-Neva), the state trade association, and as Vice President and President of the National Community Action Partnership, the national trade association. Ms. Carson has worked with programs funded by the federal Department of Health and Human Services, the IRS and the Department of Energy, leading her agency in utility assistance, weatherization, conservation education and solar exploration. She has led the agency in the development of a weatherization training program “Green TEAMWorks,” for emancipated foster youth, along with a variety of ARRA-CSBG funded initiatives. She also serves on the Workforce Development Board for Riverside County. Ms. Carson holds a bachelors in English from California State University, San Bernardino and a masters in English-Education from the University of California, Riverside.

Jeannie Chaffin is a graduate of Drury University with a bachelors of science in sociology and a certified community action professional. Ms. Chaffin has worked in the CSBG network for over twenty years, at both the state CSBG office and at a local community action agency. As Missouri's State CSBG and LIHEAP Program Manager for the last nine years, her responsibilities were to manage a portfolio of federal anti-poverty programs, contract management, monitoring, federal and state reporting, including ROMA, budget development, training and creating new initiatives and approaches to address poverty.

Richard Dieter is the Executive Director of Southwestern PA Community Development Corporation (SPCDC). He facilitates support for social enterprises of three community action agencies: Community Action Southwest, Fayette County Community Action & Westmoreland Community Action. Prior to his tenure at SPCDC, Mr. Dieter was a nonprofit management consultant for 25 years serving community development organizations in Pennsylvania, New England & the Midwest. Mr. Dieter has provided assistance to numerous community action agencies including the Pennsylvania Community Action Association. He has a B.A. from Valparaiso University and a M.Div from Lutheran Seminary.

Dr. Joyce J. Dorsey is President and CEO of Fulton Atlanta Community Action Authority (FACAA), a nonprofit organization that annually serves 30,000 individuals and families of Atlanta and Fulton County by helping them become self-sufficient. She earned a bachelor’s degree in sociology from Spelman College and a master’s degree in social work from Atlanta University. She recently earned her doctorate in Biblical studies from North Carolina’s College of Theology. Dr. Dorsey is a frequent speaker on the issues of poverty, and is member of numerous boards of directors of organizations such as the Georgia Community Action Authority and the national Community Action Partnership.

Lindley (Lil) Dupree is Director of Training and Technical Assistance for the national Community Action Partnership, Washington, D.C. She started her career in community action in 2005 in Kalispell, Montana, having worked in small business, banking, investment analysis and community economic development. While at Community Action Partnership of Northwest Montana, she served as a grant writer, development director and development officer. She joined the Community Action Partnership in January 2010. She oversees the development and implementation of learning sessions, workshops, and resources for the Partnership’s network of 1,000 community action agencies that fight poverty on the local level. She also manages grants from the federal Office of Community Services and the Partnership’s Pathways to Excellence, Award for Excellence and Certified Community Action Professional (CCAP) programs. A certified Results Oriented Management and Accountability trainer, Ms. Dupree is a graduate of Lewis and Clark College in Portland, Oregon, and is completing her masters of public administration at the University of Montana.

Eleanor Evans, Esq. is Deputy Director and Senior Counsel at CAPLAW, where she advises community action agencies on a wide range of legal matters. Ms. Evans presents workshops throughout the country and writes publications on legal issues of importance to CAAs. 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.
Stacey Flowers is the national Community Action Partnership’s Director of Community Economic Development. Ms. Flowers has over 15 years experience in the private sector, having held senior-level positions in marketing, financial management and project direction and has led training, provided project support, and directed projects for energy/utility systems in North America. Ms. Flowers earned her BS in accounting/business administration from Troy University and master of business administration with a marketing concentration from Auburn University.

Seth Hassett, M.S.W. is the Director of the Division of State Assistance within the Office of Community Services 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. For several years, he managed large-scale disaster and traumatic response programs in partnership with the Federal Emergency Management Agency. 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. Prior to joining the federal government, he worked in a variety of community settings in direct service and planning roles. He holds a masters in social work from the University of California at Berkeley and a degree in psychology and history from Guilford College in Greensboro, North Carolina.

Sherry Heyl, founder, CEO and Community Director of Concept Hub, Inc., the premiere, full service social media agency in Atlanta, GA. is especially well versed in social media, as an acclaimed author, speaker, and evangelist in supporting the democratization of knowledge and information. Ms. Heyl is responsible for building and nurturing the eRollover community, as well as managing a team responsible for providing a superior social media experience on the site, and throughout the web. Under her guidance, Concept Hub provides strategic road maps and training that enables her clients to effectively listen, connect with, and influence their growing and evolving audience. A graduate of Florida State University, Ms. Heyl earned dual undergraduate degrees in English (creative and business writing) and marketing. She also earned an AA in history and secondary education at Broward Community College in Pembroke Pines, Florida. Sherry is a native of Miami, FL.

Edward I. Leeds, Esq. is Counsel at Ballard Spahr LLP, where he is a member of the firm’s Employee Benefits and Executive Compensation Group, Health Care and P3/Infrastructure Groups and Health Care Reform Initiative. His practice concentrates on issues relating to the design, administration, and taxation of health and other welfare benefits plans. Mr. Leeds has represented employers in the negotiation and drafting of contracts with insurers, third-party administrators, and other vendors in documenting and communicating welfare benefits plans, and in complying with applicable state and federal laws, including HIPAA, COBRA, cafeteria-plan requirements, and the rules applicable to government benefits programs, such as Medicare. He has counseled employers on the introduction of paperless technologies to the administration of their benefits arrangements, the provision of benefits to domestic partners, the introduction of wellness initiatives, and health and welfare issues that arise in corporate transactions, litigation, and collective bargaining. Mr. Leeds lectures frequently on health and welfare benefits topics. Mr. Leeds is a graduate of Haverford College and Harvard Law School.

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, 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.
Faculty Biographies

**Cara Loffredo** is the Communications Assistant at CAPLAW. She coordinates and manages CAPLAW's marketing and communications initiatives including the CAPLAW website, e-news bulletins, audio conferences, financial management conference calls and e-forum, as well as designing various CAPLAW publications, online toolkits, newsletters, training modules and promotional and outreach materials. Prior to joining CAPLAW, Ms. Loffredo worked in development and fundraising for the non-profit educational travel organization, Elderhostel, Inc. in Boston, Massachusetts. Ms. Loffredo received her bachelor's degree in public relations at Suffolk University and is currently attending the New England School of Art and Design for electronic graphic design.

**Marjorie Lombard** has served as Director of Finance for Action for Boston Community Development, Inc. (ABCD), Boston's community action agency, since July 2005. Prior to joining ABCD, Ms. Lombard was the Chief Financial Officer for Catholic Charities Archdiocese of Boston. While she is a relative newcomer to the community action arena, Ms. Lombard has significant experience in the not-for-profit sector including finance, audit, banking, property management, governmental regulations and compliance, and in the implementation and management of accounting systems. She holds a bachelor of science in business administration from Northeastern University and earned her Executive MBA from Suffolk University Sawyer School of Management.

**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 States Court of Appeals, Eleventh Circuit. Ms. Ma’luf received her undergraduate and law degrees from Wake Forest University.

**Jessica Margolin, Esq.** is an associate in the Labor and Employment department of Ropes & Gray LLP. Her clients include non-profit community action organizations, hospitals, primary and secondary schools, colleges, and universities. She has extensive experience preparing employment contracts and appointment letters, drafting policies to strengthen an organization’s record of compliance with the law, and conducting training sessions on topics such as data privacy, diversity initiatives, and harassment prevention for all levels of staff and management. Ms. Margolin also handles matters with labor unions, including collective bargaining negotiations and certification petitions. In connection with the recent economic downturn, she has provided considerable guidance on voluntary retirement programs and reductions in force, drafted retirement and separation agreements, and represented clients in administrative proceedings before agencies such as the Massachusetts Commission Against Discrimination, the Equal Employment Opportunity Commission, and the National Labor Relations Board. Ms. Margolin earned her undergraduate degree from Dartmouth College and her J.D. degree from the University of Michigan Law School, where she was the Executive Editor of the Journal of Law Reform. Prior to joining Ropes & Gray, Ms. Margolin worked for an advocacy organization in South Africa promoting the constitutional right to basic education and also worked for a non-profit education research organization in Washington, D.C.

**Lawrence S. McGoldrick, Esq.,** Of Counsel with the Atlanta office of Fisher & Phillips LLP, concentrates his legal practice on assisting employers with compliance programs and preventive practices in the areas of employment law and human resources management. This includes extensive work with employers on hiring and termination practices, background investigations, pay plans/overtime issues, employment contracts/policies, and training of managers in these areas. He also works extensively with employers on dealing with ill, injured, or disabled employees. Mr. McGoldrick has handled labor and employment litigation matters in state and federal courts throughout the country and has practiced extensively before federal agencies and departments such as the Equal Employment Opportunity Commission, the U.S. Department of Labor’s Wage and Hour Division, and similar agencies in various states. Mr. McGoldrick received his B.A. from the University of Virginia and his J.D. from the University of Georgia School of Law.
Colin A. McRae, Esq. is a Partner in the Savannah office of Hunter Maclean law firm. A native Savannahian, Mr. McRae graduated from Yale University with a B.A. in history, and from the University of Georgia School of Law with a J.D., cum laude. Mr. McRae is the current Chairman of the Chatham County Board of Registrars, and serves on the Board of Directors of both the Economic Opportunity Authority of Savannah-Chatham County and the Community Health Mission, a non-profit “volunteers-in-medicine” health clinic. Mr. McRae also volunteers as attorney coach for the high school mock trial team at Savannah Country Day School, his alma mater.

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.

Timothy Phillips, Esq. is Senior Counsel for the National Home Office of the American Cancer Society, Inc. He specializes in the areas of taxation, nonprofit governance, risk management, compliance, employee benefits and executive compensation, grant reviews, vendor contracts and collaborative efforts with foreign cancer fighting entities. Prior to joining the American Cancer Society, Mr. Phillips spent eight years in private practice in the Atlanta office of Troutman Sanders LLP, where he focused on advising tax-exempt entities. Mr. Phillips is a past president of the Atlanta Volunteer Lawyers Foundation and serves on the Boards of the Navy SEAL Warrior Fund, the Naval Academy Alumni Association -- Atlanta Chapter, the Atlanta Bar Association’s Section of Taxation (Chair Elect), and the Pro Bono Partnership of Atlanta (Advisory). Mr. Phillips received his B.S. from the U.S. Naval Academy in 1989 then served as a commissioned Officer with the U.S. Navy’s SEAL Teams. He earned his J.D. from the University of Virginia. He is a native of Washington, DC and lives in Marietta, Georgia with his wife Lissa and their sons, Jacob and Miles.

Richard W. Pins, Esq. is a shareholder in Leonard, Street and Deinard’s Labor and Employment Law practice group. He splits his practice equally between the labor and employment disciplines, and both counsels and litigates on behalf of clients. Mr. Pins has appeared before numerous state and federal judges and administrative agencies, including the Department of Labor, the National Labor Relations Board, and the EEOC. He has first-chaired multiple trials and countless arbitrations, both labor and otherwise, and has argued before several state and federal district courts, as well as Minnesota and South Dakota courts of appeal. Mr. Pins counsels clients daily in a variety of employment-related areas, including wage and hour, drug and alcohol testing, FMLA, discrimination, hiring, discipline, separation, privacy, background checking, record keeping and workplace violence. Mr. Pins also counsels clients on compliance with state and federal prevailing wage laws and transportation regulations, and frequently trains supervisors and employees on the basics of employment law, positive employee relations, and preventing workplace harassment and discrimination.

Mary Pockl, CPA, Principal of S.R. Snodgrass A.C., Certified Public Accountants is the officer in charge of the non-profit services practice in the firm’s Wheeling, WV office. She serves as the Government Audit Quality Control partner for the entire firm, team captain for the Snodgrass Quality Control Group, and member of the firm’s Accounting and Auditing Committee charged with the quality control practices and standards of the firm. Ms. Pockl has over 20 years of experience in audits of not-for-profit entities and publicly funded programs, including community action agencies.

Jeffrey J. Polich, Esq. is an attorney with the Children, Families, and Aging Division of the U.S. Department of Health & Human Services, Office of the General Counsel. His primary focus is on block grant programs, including the Community Services Block Grant, Social Services Block Grant, Low-Income Home Energy Assistance Program, and the Child Care and Development Fund (CCDF). Prior to joining the OGC, Mr. Polich was a policy analyst with the Child Care Bureau of the Administration for Children and Families (ACF), where he worked on issues related to CCDF. He also has experience working at a private law firm, where he assisted clients with banking and real estate transactions, and on Capitol Hill, where he served the House Small Business Committee. He earned his juris doctor from the William and Mary School of Law and a bachelor of arts in political science and economics from the University of Michigan.
Marianna “Brandy” RayNor is the Supervisory Community Services Program Manager in the Division of State Assistance, Office of Community Services (OCS), Administration for Children and Families (ACF), U.S. Department of Health and Human Services (HHS). Ms. RayNor assists in the provision of day-to-day program administration and oversight for the Division’s CSBG, SSBG, and ARRA programs. Ms. RayNor is a former Community Services Program Analyst, with a background in program operations, administration, and financial accountability of CSBG working with states, tribal governments and community-based organizations, and with national organizations that support community services programs. She has worked with other OCS programs having served as a LIHEAP analyst, and has had prior responsibilities associated with the Empowerment Zones and Enterprise Communities program. Ms. RayNor’s experience with federal programs extends to her work in other offices of ACF, and other components of HHS, including Special Assistant to the Deputy Director of Civil Rights and as a Program Analyst evaluating the effectiveness of Medicare service agencies in the Bureau of Program Operations in the Center for Medicare Services at HHS. She holds an M.B.A. from the University of Maryland College Park and is a recent graduate of the American University Key Executive Leadership Program.

Robert E. Sasser, Esq. is Managing Shareholder of Sasser, Sefton, Tipton & Davis, PC, a full-service law firm located in Montgomery, Alabama. Mr. Sasser has served 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 coauthored “A Perfect Storm: A Confluence of Problems in Organizational Team-Building,” in the Fall/Winter 2007 issue of ACResolution. Mr. Settle received a bachelor’s degree from the University of Richmond, a master’s in public administration from the University of Southern California, and a J.D. from American University.

Christina Sieber is Director of Planning, Development and Evaluation for Action for Boston Community Development, Inc. (ABCD), Boston’s anti-poverty-agency. She has served in this position for ten years; during this period she has conducted strategic planning for this $120-million agency, has increased competitive grant funding by more than 70%, and has established an agency-wide outcomes-based evaluation process. In collaboration with a variety of academic institutions, advocacy groups and service agencies, Ms. Sieber has designed and led community-based research projects on a variety of topics—

(continued on next page)
including impacts of state and federal welfare policy, racial and ethnic health disparities, and the effects of domestic violence on publicly-funded training and job retention programs. Prior to joining ABCD, Ms. Sieber held the positions of Human Services Planner for the City of Cambridge, Massachusetts and Director of the Cambridge Council on Aging, in addition to working extensively as a planning consultant for human services agencies. She received her undergraduate education at the Massachusetts Institute of Technology.

Rachel Epps Spears, Esq. serves as Executive Director of Pro Bono Partnership of Atlanta, an organization that provides free legal assistance to nonprofits that serve low-income individuals and that cannot afford a lawyer. Pro Bono Partnership of Atlanta matches eligible nonprofits with volunteer attorneys who can help address the organization’s legal needs. Since taking on its first client in September 2005, Pro Bono Partnership of Atlanta has matched over 400 nonprofit clients with over 1,100 active attorney volunteers. Ms. Spears frequently speaks on legal topics of interest to nonprofits and has presented at conferences for the Georgia Center for Nonprofits, the Boys & Girls Clubs, and the United Way of Metropolitan Atlanta. Prior to joining the Partnership, she worked for eight years as an attorney in the public finance department at King & Spalding. An Atlanta native, Ms. Spears graduated from Davidson College with a degree in political science and received her J.D. from the University of Virginia School of Law.

Howard Snyder has worked in community development on the Northwest Side of Milwaukee since 1978 and, in 1983, founded and is currently Executive Director of Northwest Side Community Development Corporation. Under Mr. Snyder’s leadership, the Northwest Side CDC has been nationally and locally recognized for its outstanding economic, workforce and community development endeavors. Mr. Snyder is a graduate of Penn State University and holds a masters of science from the University of Wisconsin.

Brandan Still, Esq. is a Massachusetts-licensed attorney, is currently CAPLAW’s Ropes & Gray Legal Fellow. During his tenure at CAPLAW, he has advised Community Action Agencies across the country on a variety of legal issues and written articles for publication in CAPLAW’s Legal Update and on the CAPLAW website. Prior to joining CAPLAW, Mr. Still worked as a summer associate for the law firms Ropes & Gray and Chadbourne & Parke and was an intern to U.S. District Judge Marcia Crone. He received his Juris Doctor from Harvard Law School and dual Bachelors of Business Administration Degrees in Management and Economics from Lamar University.

R. Brian Tipton, Esq. is a shareholder in the Montgomery, Alabama, law firm of Sasser, Sefton, 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.

Michael Zeno, CPA, President of S.R. Snodgrass, is the officer in charge of the governmental services practice in the firm’s Wheeling, WV office. He has served on the Ohio Auditor of State’s Regional Advisory Board for the Southeastern Region and as Chairman for the Audit and Accounting Standards Committee for the Continental Association of CPA Firms. Mr. Zeno has over 30 years of experience in audits of not-for-profit entities and publicly funded programs.
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