Strengthening Community Action
Through Expert Legal Resources & Education

178 Tremont Street, 10th Floor, Boston, MA 02111
tel: (617) 357-6915 • fax: (617) 348-6134

www.caplaw.org
CONFERENCE PROGRAM

2012 NATIONAL TRAINING CONFERENCE
Hilton San Diego Bayfront Hotel • June 5 - 7, 2012

Strengthening Community Action Through
EXPERT LEGAL RESOURCES & EDUCATION
CONGRATULATIONS

CAPLAW
Community Action Program Legal Services, Inc.

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

FROM YOUR FRIENDS AT

ACTION FOR BOSTON COMMUNITY DEVELOPMENT, INC.
Celebrating 50 Years of Helping People Out of Poverty

Action for Boston Community Development, Inc.
178 Tremont Street
Boston, MA 02111
Tel: 617.348.6000
www.bostonabcd.org
Welcome to the 2012 CAPLAW National Training Conference in beautiful San Diego! We are excited that you have joined us during this critical time for Community Action. At this time of calls for increased accountability of the Community Action network, proposed budget cuts, and increased competition for funding, it is vital that Boards, CEOs, CFOs, and staff work together effectively to maintain stable and legally and fiscally sound organizations, and take advantage of opportunities to build their capacity to move people from poverty to self-sufficiency. We hope you will take full advantage of the breathtaking coastline and historic surroundings of San Diego, expert-led conference workshops, and the opportunity to network and learn from your colleagues.

Throughout the conference, our faculty of nationally recognized attorneys, Community Action leaders and top officials from government agencies will lead workshops, panels and roundtables to equip your staff and board with the knowledge and tools they need to exceed expectations and to face future governance, human resources, fiscal and legal challenges. Through training conferences such as this one, new training and technical assistance initiatives with our Community Action partners, legal and fiscal consultations, webinars, and various online tools, publications and networks, CAPLAW keeps you and your local counsel informed on the latest legal developments pertinent to CAAs.

This year’s conference will introduce exciting new training and networking opportunities, including a special networking event for State Associations, an expanded pre-conference session and a new sustainability workshop track. We are excited to be joined by David Bradley, Executive Director of the National Community Action Foundation and Jeannie Chaffin, Director of the Office of Community Services in the U.S. Department of Health and Human Services, for the opening session and to hear the Keynote address from Marielena Hincapié, Executive Director of the National Immigration Law Center (NILC). Ms. Hincapié will discuss what the current legal and political immigration debate means for the future of the U.S. She will share reflections on the recent Supreme Court hearing on Arizona, et al. v. U.S. and the high court’s impending decision, the human and economic impact of similar state laws, and her inclusive vision for our increasingly diverse country. To conclude the conference, we will be joined during closing session by George Sheldon, Acting Assistant Secretary for the Administration for Children and Families under the U.S. Department of Health and Human Services.

We hope you will leave this year’s conference with a renewed sense of unity, enhanced understanding of the critical issues facing community action and obtain new skills and strategies to effectively implement your goals on your return home.

Sincerely,

Winston Ross
President of CAPLAW

Anita Lichtblau
Executive Director/General Counsel
CAPLAW BOARD AND STAFF

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

Patricia Steiger, CAPLAW Vice President
Management Consultant & 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

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

Jerralynn Ness, CAPLAW Board Member
Executive Director, Community Action
Hillsboro, OR

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

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

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

Anita Lichtblau, Esq., CAPLAW
Executive Director & General Counsel
Boston, MA

Eleanor Evans, Esq.
Deputy Director & Senior Counsel

Peggy Nagel
Project Director, National Nonprofit Financial & Grants Management Training Program

Ashley Billingsley
Administrative Coordinator/Executive Assistant

Allison Ma’Iuf, Esq.
Associate Counsel

Cara Loffredo
Communications Manager
# Conference At-A-Glance

## Monday, June 4, 2012

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>3 p.m. - 5 p.m.</td>
<td>Registration and Information</td>
<td>Sapphire North Foyer</td>
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## Tuesday, June 5, 2012

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8 a.m. - 5:30 p.m.</td>
<td>Registration and Information</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>8 a.m. - 12:15 p.m.</td>
<td><strong>Pre-Conference Tour</strong> <em>(Registration is required. Tour will leave from the main lobby.)</em>*</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>8:30 a.m. - 11:45 a.m.</td>
<td><strong>Pre-Conference Workshops</strong> <em>(with 15 minute break)</em></td>
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<tr>
<td></td>
<td>A. HR: Maximizing Potential through Positive Employee Relations</td>
<td>Sapphire A</td>
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<td>B. FINANCIAL: Cost Allocation Best Practices</td>
<td>Sapphire EF</td>
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<tr>
<td>1 p.m. - 2:45 p.m.</td>
<td><strong>Opening Session:</strong> Welcome from local Community Action representatives, and remarks from Jeannie Chaffin, Director, Office of Community Services, ACF, HHS, John Wagner, Interim Director, California Department of Community Services and Development and David Bradley, Director, National Community Action Foundation</td>
<td>Sapphire IJMN</td>
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<tr>
<td>2:45 p.m. - 3:15 p.m.</td>
<td><strong>Afternoon Break</strong></td>
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<tr>
<td>3:15 p.m. - 5 p.m.</td>
<td><strong>Workshop Session One</strong></td>
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<td></td>
<td>1A. GOVERNANCE: Building a Board that Works</td>
<td>Sapphire 400</td>
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<td>1B. HR: Managing Leaves of Absence in the New Era</td>
<td>Sapphire A</td>
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<td>1C. FINANCIAL: First-Class Tips for Travel Policies and Time and Effort Reporting</td>
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<td>1D. SUSTAINABILITY: Be the Change: Realigning Your Organization for Optimal Impact</td>
<td>Sapphire EF</td>
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<td>1E. CSBG Hot Topics</td>
<td>Sapphire 410</td>
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<tr>
<td>5:45 p.m. - 7:30 p.m.</td>
<td><strong>Networking Reception</strong></td>
<td>Promenade Patio</td>
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## Wednesday, June 6, 2012

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<tr>
<th>Time</th>
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<tr>
<td>7:30 a.m. - 5:30 p.m.</td>
<td>Registration and Information</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>7:30 a.m. - 8:15 a.m.</td>
<td>Continental Breakfast</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>8:30 a.m. - 10 a.m.</td>
<td><strong>Workshop Session Two</strong></td>
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<tr>
<td></td>
<td>2A. GOVERNANCE: Ensuring Effective Oversight: Tools for Top Notch Organizations</td>
<td>Sapphire 400</td>
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<td>2B. HR: The Who, What and How of Workplace Investigations</td>
<td>Sapphire B</td>
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<td>2C. FINANCIAL: Tools for Forward-Thinking Financial Leadership in Tough Times</td>
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<td>2D. SUSTAINABILITY: Maximizing Results and Mitigating Risk from Game-Changing Collaborations</td>
<td>Sapphire 410</td>
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<td>2E. Head Start Update</td>
<td>Sapphire EF</td>
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<tr>
<td>10 a.m. - 10:30 a.m.</td>
<td><strong>Morning Break</strong></td>
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<tr>
<td>10:30 a.m. - 11:45 a.m.</td>
<td>Workshop Session Two Continued</td>
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<tr>
<td>12 p.m. - 1:40 p.m.</td>
<td><strong>Keynote Luncheon:</strong> A Keynote address from Marielena Hincapié, Executive Director of the National Immigration Law Center and network partner updates</td>
<td>Sapphire IJMN</td>
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<tr>
<td>2 p.m. - 3:30 p.m.</td>
<td><strong>Workshop Session Three</strong></td>
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<tr>
<td>3A. GOVERNANCE: Executive Compensation: Finding the Right Balance</td>
<td>Sapphire 400</td>
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<td>3B. HR: Employee Benefits Check-Up</td>
<td>Sapphire B</td>
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<td>3C. FINANCIAL: Financial Management: It's Not Just for CFOs Anymore</td>
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<td>3D. SUSTAINABILITY: “Think Differently”: Outside-the-Box Organizational Planning</td>
<td>Sapphire EF</td>
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<td>3E. Reducing Risk through Rock-Solid Records Management</td>
<td>Sapphire 410</td>
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<tr>
<td>3:30 p.m. - 4 p.m.</td>
<td>Afternoon Break</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>4 p.m. - 5:30 p.m.</td>
<td><strong>Workshop Session Four</strong></td>
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<td>4A. GOVERNANCE: D&amp;O Insurance: What Every Nonprofit Should Know</td>
<td>Sapphire 400</td>
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<td>4B. HR: Keeping Good Time: Wage and Hour Law</td>
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<td>4C. FINANCIAL: Dollars and Sense: Choosing the Right Financial Software for Your Organization</td>
<td>Sapphire 410</td>
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<td>4D. SUSTAINABILITY: 25+ FUNdraising Opportunities Your Board Members Will Embrace</td>
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<td>4E. Political Activity and Lobbying: Playing by the Rules</td>
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### Thursday, June 7, 2012

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<tr>
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<tr>
<td>7:45 a.m. - 12 p.m.</td>
<td>Conference Information</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>7:45 a.m. - 8:45 a.m.</td>
<td>Continental Breakfast and Roundtables</td>
<td>Sapphire North Foyer</td>
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<tr>
<td>7:45 a.m. - 8:45 a.m.</td>
<td><strong>Attorney Network Breakfast</strong></td>
<td>Sapphire 411</td>
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<td>7:45 a.m. - 8:45 a.m.</td>
<td><strong>State Association Networking Breakfast</strong></td>
<td>Sapphire 412</td>
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<tr>
<td>9 a.m. - 10:45 a.m.</td>
<td><strong>Workshop Session Five</strong></td>
<td>Sapphire 410</td>
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<tr>
<td>5A. GOVERNANCE: Using Self-Assessment Tools to Take Your Board to the Next Level</td>
<td>Sapphire 400</td>
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<tr>
<td>5B. HR: Navigating Employee Requests for Accommodations</td>
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<td>5C. FINANCIAL: Activate Your Budget: Financial Drivers and Budget Benchmarks</td>
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<td>5D. SUSTAINABILITY: Working with Businesses to Bring Revenue and Resources to Your Organization</td>
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<td>5E. Overcoming Barriers to Benefits for Immigrant Families</td>
<td>Sapphire B</td>
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<tr>
<td>11 a.m. - 12 p.m.</td>
<td><strong>Closing Session:</strong> Closing remarks from George Sheldon, Acting Assistant Secretary, ACF, HHS, and CAPLAW update from Anita Lichtblau</td>
<td>Sapphire IJMN</td>
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California/Nevada Community Action Partnership and Region IX are proud to support CAPLAW!

Dedicated to Fulfilling the Promise of Community Action

California / Nevada Community Action Partnership

cal-neva.org
The Agricultural and Labor Program, Inc.’s focus is to provide a mechanism toward achieving and maintaining family stability and economic self-sufficiency.

Established in 1968, ALPI serves the total spectrum of socially and economically disadvantaged children and families throughout Florida.

The Agricultural and Labor Program, Inc.

Deloris Johnson
Chief Executive Officer

William Holt
ALPI Board Chairperson

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863-956-3491 • Fax: 863-956-3357 • www.alpi.org

CAPLAW National Training Conference | 7
# CONFERENCE SCHEDULE

## Monday, June 4, 2012

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</table>
| 8 a.m. - 12:15 p.m. | Pre-Conference Tour  
*Registration is required. Tour will leave from the main lobby.* | North Foyer  |
| 8:30 a.m. - 11:45 a.m. | Pre-Conference Workshops  
*(with 30 minute break)* | Sapphire A   |

### A. HR: Maximizing Potential through Positive Employee Relations

Join us for this highly interactive session and learn techniques for successfully motivating, evaluating and disciplining employees. Using real-life workplace scenarios, we will examine how to manage expectations and performance by applying strategic employee relations, implementing constructive evaluations that lead to improved operations and deploying disciplinary measures that maintain legal compliance while promoting a productive workplace.

CPE Field of Study: Personnel/HR  
Level: Overview  
Presenter: Rick Pins, Esq., Leonard Street and Deinard

### B. FINANCIAL: Cost Allocation Best Practices

In this session, you will learn how to write an easy-to-implement cost allocation plan. You will briefly review cost allocation regulations applicable to government grants, get an overview of cost allocation methods including indirect cost rates and direct costing, and discuss how to develop a plan using direct costing methodologies. You will also probe particularly thorny issues that have been raised in Head Start and other reviews.

CPE Field of Study: Finance  
Level: Overview  
Presenter: Janet Johnson, Wipfli

### C. Create Jobs? Generate Income? Community Economic Development

Attend this session and find out how the Community Action network has created new jobs, generated new sources of revenue, and built opportunity in low-income communities through community economic development (CED). The national Community Action Partnership’s community economic development (CED) initiative is in its third year. Representatives from the Partnership will share what they have learned, the tools they have identified and created, and how they can help you bring community development projects to your community. This workshop will provide participants with an understanding of the field of community economic development, information about current CED projects in the Community Action network, and an understanding of CED financing options. In addition, the session will provide an overview of training available to start or expand real estate, social enterprise, and loan fund projects.

CPE Field of Study: Specialized Knowledge & Applications  
Level: Overview  
Presenters: Stacy Flowers, Community Action Partnership and Julie Jakopic, iLead Strategies
Tuesday, June 5, 2012

1 p.m. - 2:45 p.m. **Opening Session:** Greetings from local Community Action representatives, and remarks from Jeannie Chaffin, Director, Office of Community Services, ACF, HHS, John Wagner, Interim Director of the California Department of Community Services and Development and David Bradley, Director, National Community Action Foundation

3:15 p.m. - 5 p.m. **Workshop Session One**

1A. **GOVERNANCE: Building a Board that Works**
Interested in enhancing your board’s engagement and effectiveness? Learn how through the lens of a Community Action Agency (CAA) that overcame a rogue board chair, overhauled its board without bloodshed and emerged as a stronger organization. The CAA’s CEO and current board chair will detail how deliberate steps, high-risk decision-making, trusted partners, and courage can lead to constructive change and shape a model board, opening the door to new levels of organizational effectiveness. We will then extract valuable lessons from this experience that you can apply in your organization.

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenters: Carolyn Brackin Orr, Allison Speegle, and Michael Tubbs, Community Action Partnership of North Alabama and Eleanor Evans, Esq., CAPLAW

1B. **HR: Managing Leaves of Absence in the New Era**
In the last five years, a fundamental and significant change has occurred in the world of leave laws and – more fundamentally – in their management. Federal laws and regulations have continued to expand the scope of covered conditions, and imposed more burdens on already overworked human resources departments. This session will walk through the more significant changes and help you plot a course for navigating this complicated area.

CPE Field of Study: Personnel/HR
Level: Update
Presenter: Chris Hoffman, Esq., Fisher & Phillips LLP

1C. **FINANCIAL: First-Class Tips for Travel Policies and Time and Effort Reporting**
Auditors and monitors are increasingly focusing on grantees’ compliance with the requirement that allocation of all direct compensation costs of personnel be supported with after-the-fact reports reflecting the distribution among funding sources of each employee’s time and work effort. Scrutiny of travel expenditures is also a favorite topic for auditors and the media alike. Don’t get caught short; this session will explain the rules, point out the problem areas, and provide examples and best practices for ensuring compliance.

CPE Field of Study: Finance
Level: Overview
Presenter: Janet Johnson, Wipfli
1D. SUSTAINABILITY: Be the Change: Realigning Your Organization for Optimal Impact
Organizations helping low-income people achieve economic self-sufficiency are increasingly expected to demonstrate how their work positively impacts the lives of the people and communities they serve and to broaden that impact. Meeting these expectations often seems like a daunting task. Get ideas and inspiration from one Community Action Agency (CAA) that is rising to the challenge by evolving from an organization that simply delivers safety-net services to one that facilitates community-wide changes in systems and policies to reach more people and help them out of poverty. Discover what a “theory of change” is and how the CAA developed and adopted its own theory of change. Find out how the CAA is implementing its theory of change by: restructuring its internal operations; adopting evidence-based practices and defining, measuring and documenting the impact of its programs; and taking on an expanded “intermediary” role in its community – incubating innovative approaches to helping families escape poverty; tackling local policies and systems; and building capacity among community partners.

CPE Field of Study: Specialized Knowledge and Applications
Level: Overview
Presenter: Oscar Chavez, Community Action Partnership of Sonoma County

1E. CSBG Hot Topics
A panel of representatives from the federal Office of Community Services (OCS), CAPLAW, and the states will dig into the key CSBG topics of the day. Possible topics include: tripartite board selection and responsibilities; the CSBG funding and distribution process; monitoring and corrective action; the statutory restriction on use of CSBG funds for real estate; the scope of permissible state requirements for CAAs; and client eligibility.

CPE Field of Study: Specialized Knowledge & Applications
Level: Update
Presenters: Seth Hassett, Director, Division of State Assistance, Office of Community Services, ACF, HHS; Anita Lichtblau, Esq., CAPLAW; State CSBG office representative
**Workshop Session Two** *(with 30 minute break)*

**2A. GOVERNANCE: Ensuring Effective Oversight: Tools for Top Notch Organizations**

Explore the depth of your knowledge and the practical implications of nonprofit governance by participating in this interactive session. Participants will be divided into small discussion groups to analyze case scenarios based on key governance areas addressed in the new CAPLAW publication “Tools for Top Notch CAAs” – including overseeing the organization’s finances, making board meetings matter, and adopting and implementing essential governance policies. Each group will arrive at a solution for each case and share it with the session as a whole. Workshop leaders will summarize the solutions and provide a brief presentation on best practices. This is an opportunity to test your governance knowledge, express your opinions, meet CAA, Head Start and nonprofit leaders from around the country, and learn from the experiences of others.

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenters: Patricia Steiger, Management Consultant and CAPLAW Board Member; Anita Lichtblau, Esq., CAPLAW

**2B. HR: The Who, What and How of Workplace Investigations**

Conducting a prompt, thorough and legally compliant workplace investigation can be challenging. The primary objectives are to resolve the problem without a lawsuit and ensure a positive workplace environment. If a lawsuit cannot be avoided, the investigation must satisfy legal obligations and stand up to intense court scrutiny. Using scenarios and hypotheticals, we will explore: the importance of well-developed processes and policies; the role of the board of directors, staff and outside consultants; and effective ways to investigate harassment, discrimination and retaliation complaints, as well as workplace misconduct and whistleblower claims.

CPE Field of Study: Personnel/HR
Level: Overview
Presenter: John Polson, Esq., Fisher & Phillips LLP

**2C. FINANCIAL: Tools for Forward-Thinking Financial Leadership in Tough Times**

Planning in today’s uncertain environment requires that a nonprofit organization’s leaders and its funders have a clear picture of where the organization stands financially and how much financial risk it can tolerate. In this session, we will share some of Nonprofit Finance Fund’s tools and discuss how they can help your organization develop and use financial information to plan for a more sustainable future, make informed and often difficult decisions, and communicate its financial story to funders, board members and other stakeholders. We will talk through best practices in budget creation. We will offer guidance on the production and use of monthly cash flow projections, share our insight into the importance of cash flow planning as an element of any business plan, and discuss the role of cash flow planning in improving chances of receiving a line of credit or a working capital loan. We will also explore how program profitability *(Continued on page 12)*
modeling can help management and the board set program priorities, tackle deficits, improve the financial bottom line, and identify ideal cost savings. Finally, we will examine various methods for developing contingency plans in the face of uncertain cost and revenue scenarios.

CPE Field of Study: Finance
Level: Intermediate
Prerequisites: Understanding of and experience with nonprofit financial operations, management and reporting.
Presenter: Jessica LaBarbera, Nonprofit Finance Fund

2D. SUSTAINABILITY: Maximizing Results and Mitigating Risk from Game-Changing Collaborations

Collaboration has long been central to the work of CAAs, Head Start programs and other community-based organizations serving low-income individuals and families. Today, when organizations are being expected to “do more with less,” it’s even more critical. In this session, find out how your organization can lead successful community collaboration efforts to generate and implement innovative solutions, maximize limited resources, garner support and investment, and achieve increased impact. Hear from Community Action leaders about how their organizations are collaborating with others in their community to address the root causes of poverty by establishing a common vision; adopting a shared set of measurable goals; and pursuing evidence-based actions that reinforce one another’s work and further those goals. Also explore common collaboration risks and how to minimize them.

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenters: Oscar Chavez, Community Action Partnership of Sonoma County; Charles (Chuck) Hewitt, Nonprofit Insurance Alliance Group; Abigail Marquez and Jacqueline Rodriguez, City of Los Angeles, Community Development Department; and Eleanor Evans, Esq., CAPLAW

2E. Head Start Update

The Head Start world has changed dramatically for grantees in the past six months. Learn how the new designation renewal system is being implemented and strategies for ensuring that your Head Start program not only passes all of the tests with flying colors, but moves toward excellence. In this session, we will discuss strategies for both systemic compliance and adherence to key specific requirements that the Office of Head Start has focused on recently, such as: health and safety requirements, procurement, cost allocation, criminal record checks, facilities maintenance, and sharing of information with the board and Policy Council. We will discuss best practices for responding to problems identified and findings of non-compliances and deficiencies, as well as for developing and implementing corrective action plans. Last but not least, we will examine the process and criteria for awarding grants on a competitive basis.

CPE Field of Study: Specialized Knowledge & Applications
Level: Update
Presenters: Yasmina Vinci, National Head Start Association; Robert Sasser, Esq. and R. Brian Tipton, Esq., Sasser, Sefton, Tipton & Davis, P.C.
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<td><strong>Workshop Session Three</strong></td>
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<td>3A. <strong>GOVERNANCE: Executive Compensation: Finding the Right Balance</strong></td>
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<td>How do you develop a competitive compensation package that will satisfy regulators and funding sources and won’t end up on the front page of your local paper? Our presenter, who represents numerous nonprofits across the country, will discuss how to apply legal requirements (including government grant rules and IRS “Intermediate Sanctions” and incentive compensation rules) and best practices in setting executive compensation in the real world of limited resources and competition for talent.</td>
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<td>Presenter: Joel Kaleva, Esq., Crowley &amp; Fleck</td>
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<td>3B. <strong>HR: Employee Benefits Check-Up</strong></td>
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<td>The rules affecting employee benefit plans are constantly changing – be sure your organization’s plans are in good shape. Attend this session and hear about the latest developments in implementation of the health care reform law and their impact on employer-sponsored health plans. Topics will include: an update on challenges to the new law pending before the U.S. Supreme Court; W-2 reporting of health care coverage costs; handling medical loss ratio rebates; complying with the requirement to provide a summary of benefits and coverage; and preparing for the “pay or play” mandate. On the retirement plan front, find out how to comply with new fee disclosure rules, brush up on the rules that now apply to 403(b) plans, discuss common 403(b) compliance challenges resulting from the new rules and find out how to resolve them.</td>
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<td>CPE Field of Study: Personnel/HR</td>
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<td>Presenter: Sheldon J. Blumling, Esq., Fisher &amp; Phillips LLP</td>
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<td>3C. <strong>FINANCIAL: Financial Management: It’s Not Just for CFOs Anymore</strong></td>
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<td>Financial information doesn’t exist in a vacuum. It’s meant to be used by decision-makers throughout the organization – including program directors, who can offer valuable insight into their programs’ day-to-day operations and economic realities. In this session, find out why it’s important to involve program directors in financial management. Learn about steps executive and finance staff can take to ensure effective communication with program directors on financial matters, give them the information and tools they need to develop and monitor their budgets, and work with them to interpret financial data from their programs and use it to drive decision-making.</td>
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<td>CPE Field of Study: Specialized Knowledge &amp; Applications</td>
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<td>Presenter: Dan Miller, CPA, Meliora Partners, Inc.</td>
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3D. SUSTAINABILITY: “Think Differently”: Outside-the-Box Organizational Planning
While the conventional wisdom “no money, no mission” certainly holds true, it’s also important not to lose sight of your mission when pursuing funding opportunities in lean times. In this session, explore opportunities to strengthen and expand your organization’s resource base while remaining true to its mission. We will discuss the process of clarifying your organization’s mission and priorities, assessing its core competencies, and understanding and evaluating the effectiveness of its current business model (including taking into account the true cost of its current programs and activities). We will examine opportunities to make fundamental changes in your organization’s business model through an increased understanding of potential “markets” for its services and the investments required to penetrate those markets. Our discussion will cover opportunities to generate earned income, to play leadership roles in emerging government funding streams, and to build financial support from individuals, businesses and foundations.

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenter: Kay Sohl, P.A., Kay Sohl Consulting

3E. Reducing Risk through Rock-Solid Records Management
Sound records management is critical to operating efficiently, documenting compliance, preparing for and responding to monitoring, and defending against legal claims. More than just a record retention schedule, records management is an organization-wide approach to controlling records from their creation, through their distribution, use and maintenance, to their ultimate disposition. In this session, we will review relevant record retention requirements and the fundamentals of records management and offer practical tips on putting in place a compliant, consistent and cost-effective records management program.

CPE Field of Study: Business Management & Organization
Level: Overview
Presenters: Daniel Beard, CRM, ERMM, RIM Consulting

3:30 p.m. - 4 p.m.  Afternoon Break

4 p.m. - 5:30 p.m.  Workshop Session Four

4A. GOVERNANCE: D&O Insurance: What Every Nonprofit Should Know
Running a nonprofit can be a risky business – be sure your board members and officers are fully protected through directors’ and officers’ liability (D&O) insurance. Using real life scenarios and statistics, this workshop will examine what nonprofit board members and officers often get sued for, ways to manage those risks, and what to look for in a D&O policy.

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenter: Charles Hewitt, Nonprofit Insurance Alliance Group
4B. **HR: Keeping Good Time: Wage and Hour Law**

Brush up on the federal Fair Labor Standards Act (FLSA) by taking a practical look at common wage and hour compliance issues facing CAAs, 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. We will 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. We will also discuss how employees may volunteer for your organization without running afoul of FLSA requirements.

CPE Field of Study: Personnel/HR
Level: Basic
Presenter: Rick Pins, Esq., Leonard Street and Deinard

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4C. **FINANCIAL: Dollars and Sense: Choosing the Right Financial Software for Your Organization**

Whether you’re looking to upgrade your current financial software system or to install accounting software for the first time, the steps to choosing the right financial software are essentially the same: determine what your needs are, research the available software options, and then select the best software available within your budget. This workshop will walk you through each of these steps in depth to help you find the best option for your organization.

CPE Field of Study: Computer Science
Level: Overview
Presenter: Robin Kelley, CPA, Alexander, Aronson, Finning & Co. P.C.

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4D. **SUSTAINABILITY: 25+ FUNdraising Opportunities Your Board Members Will Embrace**

Ever wonder why there isn’t a quorum at the board meeting when you’ve asked board members to bring a list of 25 people they’ll ask for money? It’s no surprise – many board members dread this part of their responsibilities. Attend this workshop to discover more than 25 ways board members can FUNdraise – successfully – without making that dreaded list. Come ready to share some of your best ideas!

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenter: Jean Block, Jean Block Consulting, Inc.

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4E. **Political Activity and Lobbying: Playing by the Rules**

It’s another big election year. How can nonprofits and public agencies receiving federal grants, including CAAs and Head Start programs, operate and advocate effectively within the political activity and lobbying rules that apply to them, their employees and board members? Be sure you’re up to speed by attending this workshop and getting a nuts and bolts explanation of Internal Revenue Service, Office of Management and Budget, Community Services Block Grant and Head Start rules governing lobbying and political activity, as well as the Hatch Act and voter registration rules.

CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
Presenters: Denise Harlow, Community Action Partnership; Eleanor Evans, Esq. and Allison Ma’luf, Esq., CAPLAW
Thursday, June 7, 2012

7:45 a.m. - 12 p.m.  Conference Information

7:45 a.m. - 8:45 a.m.  Continental Breakfast and Roundtables

(See registration for topics & locations.)

7:45 a.m. - 8:45 a.m.  Attorney Network Breakfast

7:45 a.m. - 8:45 a.m.  State Association Networking Breakfast

9 a.m. - 10:45 a.m.  Workshop Session Five

5A.  GOVERNANCE: Using Self-Assessment Tools to Take Your Board to the Next Level

Is your board positioned to help your organization face current and future challenges? Does it function like a well-oiled machine on the road to success? Answer these questions and more using board self-assessment. Self-assessment can serve multiple purposes: educating the board about its function; identifying what the board is doing well and what it could do better; and engaging board members in critical discussions about the organization’s future. In this session, we will review board roles and responsibilities, examine various board self-assessment tools and offer recommendations on how to get the most out of a self-assessment. We will also engage in interactive exercises demonstrating the vital role that board self-assessment can play in helping your organization achieve its goals.

CPE Field of Study: Specialized Knowledge & Applications
Level: Basic
Presenters: Jerralynn Ness, Community Action, Oregon and CAPLAW Board Member; and Allison Ma’luf, Esq., CAPLAW

5B.  HR: Navigating Employee Requests for Accommodations

Are you confused about when and how your organization must accommodate employee requests for individualized treatment? Do you struggle with striking a balance between accommodating employees and maintaining a productive and effective workplace? Attend this session and get practical suggestions on how to respond. Review the Americans with Disabilities Act and other anti-discrimination laws and learn how to distinguish between situations that will likely require an employer to accommodate and those that are likely to result in an “undue hardship” on the employer. Examine the Equal Employment Opportunity Commission’s constantly expanding view of an employer’s legal obligation to accommodate. Finally, find out about policies and procedures your organization can implement to protect itself from liability and optimize its operations.

CPE Field of Study: Personnel/HR
Level: Update
Presenter: Merrily Archer, Esq., Hall & Evans, LLC
5C. **FINANCIAL: Activate Your Budget: Financial Drivers and Budget Benchmarks**

Agility, scenario planning, and swift decision-making are necessary financial management competencies to counteract the ever-present and dangerous force of financial inertia. Most organizations have a few key financial drivers that are critical to “make the budget work.”

Do you know your budget’s key drivers? Are they being actively monitored and understood? At what point is a change of course necessary? This session will highlight the core tools of dashboard reports and budget scenario plans to illustrate how organizations can successfully engage in dynamic budget management.

CPE Field of Study: Finance  
Level: Overview  
Presenter: Michael Anderson, Nonprofits Assistance Fund

5D. **SUSTAINABILITY: Working with Businesses to Bring Revenue and Resources to Your Organization**

Building relationships with businesses in your community can generate revenue and more for your organization. CAAs and other similar organizations have leveraged their resources and realized important benefits from those relationships – including money, advocacy, volunteers and more. Attend this session and discover how you can work with your local businesses to foster corporate sponsorship, enhance program revenue, expand earned income opportunities, partner on co-branding, and more. We’ll also explore some successful Community Action examples that could work for you.

CPE Field of Study: Specialized Knowledge & Applications  
Level: Overview  
Presenter: Jean Block, Jean Block Consulting, Inc.

5E. **Overcoming Barriers to Benefits for Immigrant Families**

Understanding the barriers that eligible individuals in immigrant families face in accessing government-funded benefits and services is critical to ensuring that those individuals are able to avail themselves of the assistance your organization provides. Join us for an interactive session in which you will learn about common issues that affect access to government-funded benefits and services for immigrants, such as concerns about “public charge,” confidentiality, verification of eligibility, sponsor-related barriers, and language access. We will discuss state laws that impose barriers or improve access to public benefits and services. Participants will also explore strategies for overcoming these barriers.

CPE Field of Study: Specialized Knowledge & Applications  
Level: Overview  
Presenter: Tanya Broder, Esq., National Immigration Law Center

11 a.m. - 12 p.m. **Closing Session**: Closing remarks from George Sheldon, Acting Assistant Secretary, ACF, HHS, and CAPLAW update from Anita Lichtblau, Esq., Executive Director
Thank you, CAPLAW

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Philip Cole, Executive Director
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The Alabama Bar requires the following: “No representation is made that the quality of legal services to be performed is greater than the quality of legal services performed by other lawyers.” Attorney responsible for content: Robert E. Sasser.
Marielena Hincapié, Keynote Speaker
Marielena Hincapié is the Executive Director of the National Immigration Law Center (NILC), the main organization dedicated to defending and advancing the rights of low-income immigrants in the U.S. Under her executive leadership, NILC has grown, and has been able to more strategically use a combination of litigation, policy, communications, and alliance-building strategies to effect social change for everyone striving to achieve the American Dream. Ms. Hincapié is highly respected for her legal and political strategies as well as her ability to connect with both Spanish- and English-speaking communities. Seen as a bridge builder within the immigrant rights field as well as across broader social justice sectors, she is committed to supporting community and labor organizing efforts. Ms. Hincapié also is a frequent lecturer at national and international conferences addressing issues of migration, and works closely with emerging leaders in the social justice movement. Ms. Hincapié began her tenure at NILC in 2000 as a staff attorney leading the organization’s labor and employment program, and then served as NILC’s director of programs from 2004 and 2008. During that time, she successfully litigated law reform and impact litigation cases dealing with the intersection of immigration laws and employment/labor laws. Before joining NILC, Ms. Hincapié worked for the Legal Aid Society of San Francisco’s Employment Law Center, where she founded the Center’s Immigrant Workers’ Rights Project. She holds a juris doctor degree from Northeastern University School of Law, served on the American Bar Association’s Commission on Immigration, and is currently a member of the Jobs with Justice Board of Directors. An immigrant from Medellín, Colombia, Ms. Hincapié is the youngest of 10 children.

Jeannie Chaffin, Opening Session Speaker
Jeannie Chaffin serves as the Director of the Office of Community Services, within the Administration for Children and Families (ACF), at the U.S. Department of Health and Human Services. Ms. Chaffin brings local, state and national level experience in anti-poverty efforts to her appointment at ACF. Prior to joining ACF, Ms. Chaffin served as the Community Services Block Grant (CSBG) Senior Program and Policy Specialist at the National Association for State Community Services Programs where her responsibilities included policy development and technical assistance to State CSBG Administrators. Ms. Chaffin also coordinated with existing partners and created new relationships with key national organizations, members of Congress, and the Administration that furthered the purposes of CSBG at the state and local levels. Ms. Chaffin has worked in the CSBG Network for over twenty years, at both a State CSBG office and a local Community Action Agency. As Missouri’s State CSBG and Low Income Home Energy Assistance Program manager, Ms. Chaffin was responsible for contract management, monitoring, Federal and State reporting, including Results Oriented Management and Accountability, budget development, training, and creating new initiatives and approaches to reduce poverty. Ms. Chaffin is a graduate of Drury University with a Bachelor’s of Science in Sociology and a Certified Community Action Professional.

John Wagner, Opening Session Speaker
John Wagner is Interim Director of the California Department of Community Services and Development (CSD). For the four years previous to this appointment, he served as Director of the California Department of Social Services (CDSS), where he oversaw programs affecting over 3 million of California’s most vulnerable residents, including foster children and youth, children and families receiving aid through the California Work Opportunities and Responsibility to Kids (CalWORKs), adults and elderly in licensed community care facilities, and aged, disabled, and blind recipients requiring assistance from In-Home Supportive Services or Supplemental Security Income/State Supplementary Program (SSI/SSP). With nearly two decades of experience in human services,
Mr. Wagner served as senior policymaker and advisor to seven gubernatorial administrations in Wisconsin, Massachusetts, and now California. Prior to California, he served as Assistant Secretary for children, youth and families for the Massachusetts Executive Office of Health and Human Services, where he coordinated policies and programs for the Office of Children, Youth and Families across multiple state agencies. Additionally, Mr. Wagner served as Commissioner for the Massachusetts Department of Transitional Assistance, where he led one the state’s largest agencies and oversaw the administration of cash assistance, shelter and food programs serving poor and low-income residents. Mr. Wagner earned a master’s degree in public administration from Harvard University’s John F. Kennedy School of Government, a master’s degree in public policy from Georgetown University and a bachelor’s degree from Marquette University.

David Bradley, Opening Session Speaker
David Bradley has been recognized as one of Washington’s leading advocates for low income programs. Mr. Bradley has worked with federal government representatives, members of Congress, congressional staff and key White House personnel to develop national policies dealing with low-income needs and related regulations and guidelines. Mr. Bradley has served as a member on a number of advisory boards and commissions. He helped found and fund CAPLAW, which provides a legal support system to this anti-poverty network and is widely credited with increasing the effectiveness of all partners, federal, state and local in the Community Services Block Grant network. Mr. Bradley established CAP-PAC, the Community Action Program Political Action Committee. This allows individuals associated with community action programs to participate in a sophisticated manner in the political process. Recently Mr. Bradley helped create CAP Fund, which is the first venture capital fund to be established to assist CAAs in their economic development activities. Mr. Bradley continues to demonstrate the 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 turned that challenge into an opportunity to fully discuss the Community Action network. 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.

George Sheldon, Closing Session Speaker
George Sheldon is the Acting Assistant Secretary for the Administration for Children and Families under the U.S. Department of Health and Human Services. Prior to joining ACF, Mr. Sheldon served as the Secretary of the Florida Department of Children and Families (DCF). During his time in Florida, Mr. Sheldon oversaw the state’s child welfare programs, fostering a 36 percent reduction in children in out-of-home care, and integrating mental health, substance abuse and domestic violence services throughout the Department. During Mr. Sheldon’s tenure, Florida achieved the nation’s highest rate of adoptions among foster children for two years, and moved the state from one of the worst food stamp error rates in the country to number 1 in the country for three consecutive years. In early 2010, Mr. Sheldon worked closely with federal partners at HHS and ACF in the aftermath of Haiti’s catastrophic earthquake. Together, Florida and ACF met the needs of more than 27,000 American citizens, 700 medical evacuees, and 600 Haitian children moving through the adoption process with American families. Before his service at DCF, Mr. Sheldon was Associate Dean for Student and Alumni Services at St. Thomas University School of Law. In addition to more than 12 years as a practicing attorney, Mr. Sheldon also served as Deputy Attorney General for central Florida, managing five regional offices and more than 400 employees. In 1975, Mr. Sheldon was elected to the Florida House of Representatives, where he built an eight-year record focusing on the environment and children. Born in Wildwood, New Jersey, Mr. Sheldon received both his B.A. and J.D. from Florida State University.
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extends a sincere thanks to the CAPLAW staff and their partners who put a great deal of energy and effort into creating a successful 2012 CAPLAW Conference in beautiful San Diego.

PACIFIC NORTHWEST COMMUNITY ACTION ASSOCIATION

Lisa Stoddard, President
Jerralynn Ness, CAPLAW Board Member
CAPLAW BOARD MEMBER BIOGRAPHIES

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 and National Social Worker of the Year Award. He received a bachelor of science from New York University and a master’s degree in social work from Columbia University.

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 Executive 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 (NACAA) 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. 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 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 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.

John J. Drew, CPA, 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, 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.

Jerralynn Ness, CCAP, has been with Community Action in Washington County, Oregon since 1973, serving as the Executive Director since 1984. She is recognized as a leader in the larger Portland metropolitan area for her ability to bring the community together and facilitate positive change for those less fortunate. Ms. Ness has been very active in the larger Community Action network where she served on the national Community Action Partnership Board for twelve years. In 2002 she achieved her certification as a Community Action Professional (CCAP) and has served on the national CCAP Commission since 2006. In 2010 she was elected to serve on the national CAPLAW Board of Directors. Over the years, Ms. Ness has held numerous leadership positions in her local community. She currently serves on the board of directors of the Hillsboro Chamber of Commerce, Vision Action Network, Hillsboro Community Foundation, and Community Action Partnership of Oregon (CAPO). Ms. Ness chairs a statewide CAPO initiative called Oregon Thrives and serves on a regional business Leadership Council organized by Metro. In 2011 she received the “Emma C. McKinney Distinguished Citizen Award” and in 2003 received the “Oregon Community Action Spirit” Award from CAPO and was honored by the Oregon Commission for Women with their “Woman of Achievement” award.
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.

Leonard Dawson, JD, CCAP, Board Member Emeritus, recently retired from his position as Executive Director of the Coastal Georgia Area Community Action Authority, Inc. in Brunswick, Georgia, where he worked for over 35 years. Mr. Dawson led the agency to become the largest community-based human services organization in the coastal area of Georgia. He has long 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 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, the 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.
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### FACULTY BIOGRAPHIES

#### Michael Anderson
Michael Anderson, Training Program Manager at Nonprofits Assistance Fund, coordinates the development and delivery of unique, expert trainings that enable nonprofit staff and board members to enhance their financial management skills, implement best practices, and engage in strategic thinking. He works closely with nonprofits as a lender, consultant, and trainer, granting him a unique perspective on the financial management challenges and issues that nonprofits regularly face. In the community, he serves as adjunct faculty at the University of Minnesota, on the Board of Directors of PRG, Inc., and on committees of the Social Enterprise Alliance, Lifetrack Resources, and the Humphrey School’s Public and Nonprofit Leadership Center. Nonprofits Assistance Fund is a Minneapolis-based nonprofit with a mission to build financially healthy nonprofits that foster community vitality. The mission is achieved by providing nonprofits with loans, trainings, and strategic financial guidance.

#### Merrily S. Archer, Esq., M.S.W.
Merrily Archer, Special Counsel at Hall and Evans LLC, began her legal career at the U.S. Equal Employment Opportunity Commission (EEOC) in Denver, Colorado. As an EEOC Trial Attorney, she soon realized that weak workplace “defensive management” practices accounted for the vast majority of EEOC charges, employment discrimination lawsuits, large employer settlements, and poor litigation results. Therefore in 2000, Ms. Archer rededicated her career to helping employers avoid the certain hassle and expense of employment litigation and to actively supporting Human Resources professionals “in the trenches.” Since 2006, Ms. Archer’s practice has concentrated on representing employers in EEOC-initiated litigation and in EEOC “systemic investigations” regarding neutral employment practices that, the EEOC believes, have an “adverse impact” on protected groups (e.g., criminal background checks, credit checks, hiring tests/criteria, Reduction-in-Force criteria). Ms. Archer has developed successful cost-effective strategies for defending against EEOC systemic investigations and litigation, actively collaborating with adverse impact analysis and test validation experts throughout the country. Ms. Archer has also co-produced a series of widely-broadcast webinars for in-house employment counsel and senior HR practitioners on adverse impact theory and testing, pre-employment test and criteria validation, and avoiding disparate impact claims in a Reduction in Force context.

#### Dan Beard, CRM, ermm
Dan Beard is Vice President of RIM Consulting for Cadence Group, an Atlanta-based information and records management consulting firm that helps clients obtain and manage information tailored to specific needs. Mr. Beard holds a BA in Economics and International Business from the State University of New York at Buffalo, and an MBA from Drake University. He has over 15 years experience in records and information management (RIM). Mr. Beard specializes in integrating technology with business and workflow design to optimize ROI and workflow. He has expertise in the development and implementation of Records and Information Management Programs, including Records Policies, Procedures and Records Retention Schedules, Business Resumption Plans, Production Scan Operations, Risk Management Strategies, Records Management Training, RIM Software validation and configuration, and Program Implementation. His industry experience includes not-for-profit education and clinical services, automobile, banking, city and county governments, healthcare, manufacturing, mining, natural gas, property management, and software. He has created and conducted records management training seminars for the American Records Management Association (ARMA) chapter meetings and for Lorman Education Services. Mr. Beard is a Certified Records Manager, Electronic Records Management Master, and Lean Six Sigma Certified.

#### Jean Block
Jean Block, President of Jean Block Consulting, Inc. and Social Enterprise Ventures, LLC, has more than 45 years experience in the nonprofit sector as a board and staff leader for various local, regional and national organizations. She is now a nationally recognized consultant and trainer on nonprofit management, FUNdraising, board development and social enterprise. She has written 2 nonprofit books, The ABCs of Building Better Boards and Fast Fundraising Facts for Fame & Fortune, and has two more books ready for publication in 2012 by CharityChannel Press. Ms. Block has consulted with many community action agencies throughout the US and is a strong supporter of the community action mission and purpose.
Sheldon J. Blumling, Esq.
Sheldon Blumling is a partner in the Fisher & Phillips LLP Irvine office and a member of the firm’s Employee Benefits Practice Group. He advises clients with respect to all aspects of employee benefits and executive compensation, including qualified and nonqualified retirement plans, health and other welfare benefit plans, cafeteria plans, severance plans and equity-based compensation plans. He also advises employers on compliance issues involving the Health Insurance Portability and Accountability Act (HIPAA) and all types of federal and state employment taxes, and he has had extensive experience advising clients on the employee benefits and executive compensation aspects of mergers and acquisitions. Mr. Blumling joined the firm in its Atlanta office in 1998, and then rejoined the firm in its Irvine office in 2003 after practicing in the tax and employee benefits groups at a full-service, international law firm for four years. While in law school, he served as Managing Editor of the University of Miami Entertainment and Sports Law Review. Mr. Blumling has been listed in Chambers USA, America’s Leading Business Lawyers since 2009.

Carolyn Brackin Orr
Carolyn Brackin Orr is Board Chair for the Community Action Partnership of North Alabama. In her fifth year as a Board Member, Ms. Orr has served on numerous committees including: Executive, Finance, Nominating, Housing, By-Law, Business Development, Head-Start Policy Council, Strategic Planning and the Annual Report Team. Ms. Orr represents the Community Sector of rural Lawrence County in her Board role. Ms. Orr is a contract lecturer for Jackson Thornton, Inc. and brings over twenty-years of customer service and management skills to each of her presentations. She provides national specialized training in Board Leadership, Empowering Women, Employee Development and many other topics. Orr is the President and Founder of Orr Ministries, Inc., a 501C3 Non-Profit Organization, as well as a recognized author, book reviewer, and journalist.

Tanya Broder, Esq.
Tanya Broder, Senior Staff Attorney at the National Immigration Law Center (NILC), specializes in the laws and policies affecting access to health care, public benefits and education for low-income immigrants across the United States. She writes articles and policy analyses, provides technical assistance, co-counsels on litigation, and presents trainings to legal and social service providers, government agencies, legislative staff, and community-based organizations. Before joining NILC in 1996, she worked as a policy analyst for the Northern California Coalition for Immigrant Rights and as a staff attorney for the Legal Aid Society of Alameda County in Oakland. Ms. Broder holds a juris doctor from Yale Law School.

Oscar Chavez
Oscar Chavez is the Executive Director of the Community Action Partnership of Sonoma County, one of the largest community benefit organizations in northern California, operating programs annually benefitting more than 13,000 low-wealth children, youth and families in underserved neighborhoods. Community Action is a dynamic multi-funded, multi-program service and advocacy organization dedicated to partnering with families and individuals to improve lives and build healthy communities. In both his previous work experience and in his current position, Mr. Chavez has dedicated himself to establishing strong and positive ties between the County’s low wealth neighborhoods, public entities and the business community in order to raise awareness about the growing education, health and income disparities that exist in our communities. He is equally committed to finding solutions that get at the root cause of poverty. An active member in the community and an advocate for the poor, Mr. Chavez currently serves as Chair of First 5 Sonoma County; Co-chair of the Sonoma County Innovation Action Council; Co-chair of the Sonoma County Health Action Council; board member, Community Foundation; board member, Traditional Medicinals Foundation; Legislative and Policy Chair for the California/Nevada Community Action Partnership; Member of the Workforce Investment Board; and member of the California Stewardship Network, a statewide effort to promote regional economies and civic entrepreneurship. In 2008 he was chosen as one of the North Bay’s "40 Under 40" leaders by the North Bay Business Journal. In 2012 he received the County of Sonoma Jefferson Award for Public Service.
FACULTY BIOGRAPHIES

Eleanor Evans, Esq.
Eleanor Evans is Deputy Director and Senior Counsel at CAPLAW, where she advises Community Action Agencies on a wide range of legal, governance and financial 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.

Stacy Flowers
Stacy Flowers brought business development experience to support community action efforts as the Director of Community Economic Development for the Community Action Partnership. The national office, supported by OCS, has developed support for state offices and local agencies through creating and expanding training and technical assistance on community development initiatives for low-income communities. As a rural Alabama native, the challenges of tackling economic development strategies is always close to her heart. In addition to her rural roots, she has also worked with over 150 municipal offices globally. Most recently, Ms. Flowers was chosen as one of 36 students from 20 countries for the 2011-12 Strategy and Innovation Post Graduate Diploma at University of Oxford. In addition, Ms. Flowers holds a BS in business administration and accounting from Troy University and an MBA in marketing from Auburn University.

Denise Harlow
Denise Harlow joined the Community Action Partnership in late 2011 as Project Director for the National Risk Mitigation and Quality Improvement Training and Technical Assistance Center. Ms. Harlow has more than 20 years of experience in the nonprofit and governmental sectors, most recently serving as CEO for the NYS Community Action Association and its 52 Community Action Agencies. Prior to her tenure at NYSCAA, Ms. Harlow was the Sr. Vice President for Capacity Building at the New York Council of Nonprofits where she provided a range of consulting and training to nonprofits, including many Community Action Agencies. Earlier in her career Ms. Harlow worked as a social worker at Schenectady Community Action Program. Ms. Harlow has experience in governance, strategic planning, public policy/advocacy, and organizational development and has served on numerous nonprofit boards of directors. She has a Masters Degree in Social Work from the University at Albany where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society, and holds a bachelors degree in social work from Valparaiso University.

Seth Hassett, M.S.W.
Seth Hassett 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.
Charles C. Hewitt
Charles Hewitt, Claims Technical Director of Nonprofits Insurance Alliance Group in Santa Cruz, California, has over 40 years of management experience at both national and regional carriers. Before taking his current position, he was under contract to the California Insurance Commissioner to wind up the affairs of the former Golden Eagle Insurance Company, and prior to that he held successive executive positions with Liberty Mutual, Western Employers, Industrial Indemnity and Zenith Insurance Companies. Mr. Hewitt has been a frequent speaker at conferences sponsored by the Association of Southern California Defense Counsel, the Workers’ Compensation Defense Counsel Association, the National Association of Independent Insurance Adjusters, the Harmonie Group, and Lorman Education Services. He is a past president of the Los Angeles Claim Managers’ Council, a member and the 1997 past president of the Pacific Claim Executives Association, a member of the Central Claim Executives Association, past national co-chair of the National Association of Independent Insurance Adjusters National Advisory Council (on which he still sits), a member of the American Management Association, and the current President of the Board of Directors of the Big Brothers Big Sisters of Santa Cruz County. Mr. Hewitt resides in Soquel, California with his wife Mary. Besides doting on their 3 children and 6 grandchildren, they like to travel, play bridge and tend to their shih tzu, Lucy.

Chris Hoffman, Esq.
Chris Hoffman is the founding and managing partner of Fisher & Phillips LLP’s San Diego office. Mr. Hoffman has represented hundreds of employers in matters ranging from class action wage and hour disputes, to harassment litigation, union representation attempts, and general employment advice. In addition, Mr. Hoffman advises employers in the complicated area of family and medical leaves as well as the Fair Credit Reporting Act, the Americans with Disabilities Act and workers compensation laws. Mr. Hoffman also spends a significant amount of time counseling clients regarding day to day employment issues and assisting them to find practical solutions to their legal problems in a proactive manner. This includes extensive supervisor training as well as preparing sound employment policies and procedures.

Julie Jakopic
Julie Jakopic, founder and managing partner of iLead Strategies, has been helping leaders succeed since she tutored her friends in math in second grade. Born in Washington, DC, she learned about social justice from her activist mom and about business success from her entrepreneur dad. Ms. Jakopic’s career has taken her back and forth across the private, public and nonprofit sectors, consistently bringing her laser focus on mission driven strategic leadership and service excellence. The co-author of Planning for Results, a strategic planning tool for organizations, Ms. Jakopic is a nationally recognized and respected coach, facilitator and strategist known for her pragmatic optimistic approach. Before launching her own firm, iLead Strategies, Ms. Jakopic built and led successful teams in her work as vice president and human services practice leader at the Development Services Group and in executive positions at ICF International, The Finance Project and the National Association for State Community Services Programs (NASCSP). She was awarded the Ann Kagie National Community Services award by the National Association for State Community Services Programs and the Legislative & Public Policy Award by the Alexandria Commission for Women. She holds an MA in sociology and a BA in communication from the University of Maryland.

Janet S. Johnson, CPA, CMA
Janet Johnson, Senior Manager at Wipfli LLP, uses her background in auditing and process analysis to provide training on federal regulations that is focused on operational results. She presents in-person and Internet-based training to nonprofit and governmental organizations on the rules they must follow when receiving federal funds. Ms. Johnson’s goal is help managers and staff understand how to be effective and efficient in achieving their mission while maintaining compliance with regulations.
Joel Kaleva, Esq.

Joel Kaleva is a partner at Crowley Fleck, PLLP. His practice focuses on counseling nonprofit organizations about the complicated interplay among the different federal and state agencies that regulate the activities of these organizations. Mr. Kaleva assists clients in the formation of not-for-profit corporations, and represents not-for-profit corporations in securing recognition of exemption from federal and state income tax. He advises tax exempt organizations on all aspects of federal tax issues associated with their operations including, joint ventures with both nonprofit or for-profit entities, unrelated business income issues, mergers and dissolution of exempt organizations. Mr. Kaleva also assists clients in establishing effective employee benefit plans, developing related subsidiary organizations and creating efficient administrative procedures and governance policies for his clients. Mr. Kaleva teaches continuing legal and professional education courses throughout the United States. These courses assist nonprofit board of directors, executives, fiscal officers and attorneys in identifying potential problems that affect nonprofit agencies as well as providing them with suggestions for establishing procedures that will prevent future problems. He serves on numerous nonprofit boards and advisory committees and is a member of the ABA’s Taxation Committee.

Robin D. Kelley, CPA, CITP, CSPM

Robin Kelley, shareholder and Vice President of Alexander, Aronson, Finning, & Co. P.C., is an AICPA Certified Information Technology Professional (CITP) and is also certified in Strategic Performance Management (CSPM). As AAF Vice President, Ms. Kelley is an acknowledged specialist in nonprofit audit and accounting services with expertise in auditing in accordance with Government Auditing Standards and Office of Management and Budget (OMB) Circular A-133. She is a specialist on nonprofit organizations and Federal and state funding reporting requirements. She serves clients in a variety of nonprofit industries where she consults on financial, accounting, and bottom line enhancement matters. She works with clients to establish strategic performance systems. She also consults with clients regarding their accounting systems and network configurations. Ms. Kelley serves as a leader of the firm’s audit section and oversees the firm’s Performance Measurement division. Ms. Kelley is a member of the American Institute of Certified Public Accountants (AICPA) and a member of the Nonprofit Accounting and Auditing Committee of the Massachusetts Society of Certified Public Accountants (MSCPA). She served as Chair of the Nonprofit Accounting and Auditing Committee for two years. In addition, Ms. Kelley presents training courses for fiscal directors of businesses and other CPA’s on behalf of the MSCPA, the Commonwealth of Massachusetts, the United Way of Massachusetts Bay, and many other membership associations. She has a bachelor of science degree in Accounting with Honors from Bentley College and an AICPA Certificate of Achievement in Government Accounting and Auditing.

Jessica LaBarbera

Jessica LaBarbera is the Director of the California Market of Nonprofit Finance Fund, a national CDFI providing capital and technical assistance to the nonprofit sector. In that role Ms. LaBarbera leads program growth and product delivery in California. She is responsible for identifying market needs and opportunities and meeting business development goals, as well as overseeing new regional initiatives and rolling out new products and services in the region. Having previously served as an Associate Director for the Northeast Region of NFF, Ms. LaBarbera plays an important role in integrating the organization’s national initiatives to those of the California market. Previously, Ms. LaBarbera was a Vice President at Citi Community Capital, a division of Citigroup Global Markets Inc., where she provided structured financing and relationship management to national nonprofit and Community Development Financial Institution (CDFI) clients. Additionally, Ms. LaBarbera has served as a consultant to both municipal government social service agencies and nonprofit advocacy organizations and direct service providers. Ms. LaBarbera holds an MPA in Nonprofit Management from Columbia University’s School of International and Public Affairs and a BA in sociology from the University of Virginia.
Anita Lichtblau, Esq.
Anita Lichtblau 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 CAAs 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.

Allison Ma’luf, Esq.
Allison Ma’luf 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.

Abigail Marquez
Abigail Marquez currently serves as a Program Manager for the City of Los Angeles, Community Development Department (CDD). In this capacity, she is responsible for managing twenty-one FamilySource Centers (FSC), throughout the city, which serve as the delivery system for anti-poverty initiatives and provide core services designed to assist low-income families become more self-sufficient by increasing family economic resources and youth academic performance. Ms. Marquez returned to CDD after a two and half-year tenure with the Office of Mayor Antonio R. Villaraigosa, where she served as Area Director. As Area Director, she served as the community liaison to over 14 communities in the eastern region of the City. Ms. Marquez began her career in public service in 2000. She has also worked with the Mexican American Legal Defense and Educational Fund (MALDEF), as the California Higher Education Outreach Director. She was instrumental in developing a statewide campaign to expand the opportunity for Latino students, primarily undocumented immigrant students, to access an equitable post-secondary education. Ms. Marquez has a bachelor of arts degree in liberal studies with concentrations in english and sociology and a master of science degree in project management.

Daniel Miller, CPA
Dan Miller, Chief Financial Officer of Meliora Partners, is an accomplished national trainer. His diverse background in financial management and grants administration has helped advance the capacity of hundreds of nonprofit professionals and the organizations they serve. Mr. Miller’s areas of expertise include Low Income Housing Tax Credits, organizational assessment, systems development, forensic accounting, contract negotiation, and debt restructuring. He also provides onsite and remote financial management services to support nonprofits. Mr. Miller earned a B.A. in Accounting and is a Certified Public Accountant. He has held financial management positions in both the nonprofit and private sectors for nearly 40 years, and he joined the Meliora team in 2001. Mr. Miller’s personal commitment to “following the money” has made him a national leader in the nonprofit network.
Faculty Biographies

Richard W. Pins, Esq.
Rick Pins is a shareholder in Leonard, Street and Deinard, P.A. 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.

John M. Polson, Esq.
John Polson is a partner at Fisher & Phillips LLP in the Irvine and Los Angeles offices. He represents employers in all aspects of labor and employment law, including wage and hour compliance, employment policies and practices, safety compliance, litigation, supervisor training, and other employment related legal matters. Mr. Polson handles administrative and civil employment matters, including jury trials and arbitrations, before state and federal courts and government agencies throughout the United States. He has expertise in handling complex, multi-plaintiff harassment and discrimination matters, wage & hour and other administrative matters. Mr. Polson also has particular expertise in compliance, training, and liability prevention. Mr. Polson has conducted more than 500 in-house management seminars and training sessions for executives, supervisors, managers, and human resources professionals in all aspects of labor and employment law, including sexual harassment, hiring and firing, union avoidance, FMLA, ADA, workers’ compensation fraud, arbitration, wage and hour compliance, and equal employment opportunity law.

Jacqueline Rodriguez
Jacqueline Rodriguez currently serves as a CSBG Program Manager for the City of Los Angeles, Community Development Department (CDD). She was part of the team who was responsible for the redesign of the City of Los Angeles FamilySource System. Comprised of five city-managed and 16 non-profit managed FamilySource Centers the system is the city’s vehicle for the delivery of anti-poverty services and initiatives. She is also a member of the 2009 California Awards for Performance Excellence (CAPE) Board of Examiners. Ms. Rodriguez also serves as the Staff Liaison to the City of Los Angeles Community Action Board.

Robert E. Sasser, Esq.
Robert Sasser is the founding shareholder of the Montgomery, Alabama, law firm of Sasser, Sefton, Tipton & Davis, P.C. He is a graduate of Auburn University and the Cumberland School of Law of Samford University. Mr. Sasser is admitted to practice before all federal and state courts of Alabama, the Fifth Circuit Court of Appeals, the Eleventh Circuit Court of Appeals, and the United States Supreme Court. The areas of concentration for Mr. Sasser’s practice include non-profit associations; water and wastewater agencies; and financial institutions. He has been selected as one of the Top Attorneys in Alabama and as a Super Lawyer in business representation the past several years. He has served as past Chair of the Parents Council, Furman University and presently serves on the Board of Overseers for Samford University.

Kay Sohl, PA
Kay Sohl of Kay Sohl Consulting has provided training and consultation for boards of directors, executive directors, and CFOs of over 5,000 not-for-profit organizations throughout the United States. Ms. Sohl’s work is focused on redevelopment of nonprofit business models, financial management, and board governance issues. Ms. Sohl works extensively with CAAs, providing training and toolkits through CAPLAW, the Community Action Partnership, and state associations, and strategic planning and board development consultation for individual CAAs.
Allison Speegle
Allison Speegle is Executive Assistant to the CEO for the Community Action Partnership of North Alabama. For seven years Ms. Speegle has been responsible as Recording Secretary and Liaison to the Board of Directors and primary gatekeeper for access and information flow to and from the CEO’s office. Ms. Speegle manages and schedules interaction with the Lead Team for the CEO and she supports the fiscal department as a third party overseer. Ms. Speegle is a member of the agency Lead Team and is involved as a key part of HR decisions and issues. Ms. Speegle has a working knowledge of many parts of the agency due to her experience in various programs and in the staff support roles she has played. Ms. Speegle represents the office of the CEO and the agency in many outside business functions.

Brian Tipton, Esq.
Brian Tipton is a shareholder in the Montgomery, Alabama, law firm of Sasser, Sefton, Tipton & Davis, P.C. He is a summa cum laude graduate of both the Louisiana State University and the 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. Mr. Tipton’s practice is concentrated in the representation of nonprofits and other tax-exempt organizations. He regularly represents Community Action Agencies and Head Start Programs in the areas of regulatory compliance, audits, funding source disputes, administrative appeals, and litigation. In addition, Mr. Tipton consults with organizations on governance, human resources, programmatic, and corporate matters, and develops and presents training programs for nonprofits.

Michael Tubbs
Michael Tubbs is Chief Executive Officer of the Community Action Partnership of North Alabama. Mr. Tubbs has been in this role for seven years, having retired from Alabama Power Company after a 30 year career. He has led the agency through a major board re-structuring, the revision of each foundational document of the agency, the teaching and embedding of a servant-leader concept, a vision/mission exercise and its first strategic plan. The agency has seen significant growth of its geographic footprint and in the impact of the agency’s programs. The Partnership employs over 500 full time employees and has business operations in 24 of Alabama’s counties from its base in the Tennessee Valley.

Yasmina S. Vinci
Yasmina Vinci, Executive Director of the National Head Start Association, is a seasoned leader in both executive and policy roles whose professional experience and capabilities have delivered improvements in the lives of children at the national, state, and local levels. Ms. Vinci comes to the National Head Start Association after several years as principal and founder of EDGE Consulting Partners. At EDGE, Ms. Vinci pursued local, national and global projects that utilized the knowledge, experience, and connections of her years in human services and early education, to enhance the capacity of organizations to thrive as competent, strategic entities capable of influencing policy. A deep understanding of child care issues and challenges at the most local level informs Ms. Vinci’s experiences. She brings to her new role over ten years of executive director experience at national organizations. As the first Executive Director of the National Association of Child Care Resource & Referral Agencies (NACCRRA), she led NACCRRA’s transition from an all-volunteer association of fewer than 200 child care resource and referral agencies to a powerful national network of 860+ community-based organizations. In addition to holding leadership positions on the governing Boards of the National School Age Care Alliance, the Interfaith Council for the Homeless, United Way, and others, she has also served on numerous advisory boards and task forces, and for nine years was Commissioner on the National Head Start Fellowship Commission. Currently, Ms. Vinci serves on the Governing Board of the Council for Professional Recognition, the Board of the Children’s Investment Fund, the Advisory Board of Boston EQUIP, and others. Ms. Vinci received her master in public administration degree from Harvard’s Kennedy School of Government.
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