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.
Dear CAPLAW Conference Participants,

Welcome to the 2013 CAPLAW National Training Conference in our hometown, Boston! We are excited you have joined us to learn about the most pressing and critical issues in the Community Action network today. At this time with the sequestration in effect, it is more important than ever to run a legally and fiscally sound organization. We hope you will take advantage of the historic culture of Boston, expert-led workshops and panels, 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.

We are excited to feature workshops highlighting changes in the Affordable Care Act, measuring an organization’s performance, managing program budgets, preparing social media policies and many more. We are pleased to be joined by Jeannie Chaffin, Director of the Office of Community Services at the U.S. Department of Health and Human Services; Aaron Gornstein, Undersecretary for the Massachusetts Housing and Community Development Department; and Lisbeth Schorr, Senior Fellow of the Center for the Study of Social Policy for the opening session and to hear a keynote conversation between Ellen Teller, Director of Government Affairs at the Food Research and Action Center and Don Mathis, President and CEO of the Community Action Partnership. To conclude the conference, we will receive a legislative update from David Bradley, Executive Director of the National Community Action Foundation.

We hope you will leave this year’s conference with ideas to help your organization increase in efficiency, an enhanced understanding of critical issues facing community action and new skills and strategies to effectively implement your goals and prepare for future challenges.

Sincerely,

Winston Ross
President of CAPLAW

Anita Lichtblau
Executive Director/General Counsel

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

Winston Ross, President ● David Brightbill, Vice President ● Gale F. Hennessy, Treasurer
Jerralynn Ness, Secretary ● Anita Lichtblau, Esq., Executive Director/General Counsel ● David Bradley, Coordinator
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Staff Attorney

Allison Ma’luf, Esq.
Associate General Counsel

Stephanie Knechtle
Communications Coordinator

Ashley Billingsley
Administrative Coordinator/Executive Assistant
## Conference at-a-Glance

### Tuesday, June 18, 2013

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<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>3 p.m. - 5 p.m.</td>
<td>Registration and Information</td>
<td>Main Lobby</td>
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</tbody>
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### Wednesday, June 19, 2013

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 a.m. - 5:30 p.m.</td>
<td>Registration and Information</td>
<td>Ballroom Foyer</td>
</tr>
<tr>
<td>8 a.m. - 12:15 p.m.</td>
<td>Pre-Conference Tour</td>
<td>Republic Ballroom</td>
</tr>
<tr>
<td>9:30 a.m. - 11:30 a.m.</td>
<td>Pre-Conference Workshops (with 15 minute break)</td>
<td>Back Bay A</td>
</tr>
<tr>
<td>1 p.m. - 2:45 p.m.</td>
<td>Opening Session: Welcoming remarks from the CAPLAW board, opening session speakers</td>
<td>Grand Ballroom</td>
</tr>
<tr>
<td>2:45 p.m. - 3:30 p.m.</td>
<td>Afternoon Break</td>
<td>Ballroom Foyer</td>
</tr>
<tr>
<td>3:30 p.m. - 5 p.m.</td>
<td>Workshop Session One</td>
<td>Back Bay B</td>
</tr>
<tr>
<td>1A. GOVERNANCE: Board and Staff Roles - The Invisible Yellow Line</td>
<td>Back Bay B</td>
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<tr>
<td>1B. HR: Ushering in the New Normal: Changes Under the Affordable Care Act</td>
<td>Republic Ballroom</td>
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<tr>
<td>1C. FINANCIAL: Double Threat: Cash Flow and Compliance Challenges</td>
<td>Back Bay C</td>
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<tr>
<td>1D. SUSTAINABILITY: Organizational Performance Standards in Community Action</td>
<td>Back Bay D</td>
<td></td>
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<tr>
<td>1E. Facilities Fundamentals</td>
<td>Constitution Ballroom</td>
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<tr>
<td>5:45 p.m. - 7:30 p.m.</td>
<td>Networking Reception</td>
<td>Constitution Ballroom</td>
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### Thursday, June 20, 2013

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:30 a.m. - 5:30 p.m.</td>
<td>Registration and Information</td>
<td>Ballroom Foyer</td>
</tr>
<tr>
<td>7:30 a.m. - 8:15 a.m.</td>
<td>Continental Breakfast</td>
<td>Ballroom Foyer</td>
</tr>
<tr>
<td>8:30 a.m. - 10 a.m.</td>
<td>Workshop Session Two</td>
<td>Constitution A</td>
</tr>
<tr>
<td>2A. GOVERNANCE: Putting Governance Principles into Practice</td>
<td>Back Bay B</td>
<td></td>
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<tr>
<td>2B. HR: ADA on Trial: A Litigation Case Study of a Failure to Accomodate Case</td>
<td>Republic Ballroom</td>
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<tr>
<td>2D. SUSTAINABILITY: Measuring and Managing Organizational Performance in the Real World</td>
<td>Constitution B</td>
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<tr>
<td>2E. Head Start Update</td>
<td>Ballroom Foyer</td>
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<tr>
<td>10 a.m. - 10:30 a.m.</td>
<td>Morning Break</td>
<td>Ballroom Foyer</td>
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<tr>
<td>10:30 a.m. - 11:45 a.m.</td>
<td>Workshop Session Two (continued)</td>
<td>Ballroom Foyer</td>
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## Thursday, June 20, 2013 (continued)

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>12 p.m. - 1:40 p.m.</td>
<td><strong>Keynote Luncheon</strong>&lt;br&gt;Keynote conversation with Ellen Teller, Director of Government Affairs, The Food Research and Action Center (FRAC) and Don Mathis, President and CEO, Community Action Partnership</td>
<td>Grand Ballroom</td>
</tr>
<tr>
<td>2 p.m. - 3:30 p.m.</td>
<td><strong>Workshop Session Three</strong>&lt;br&gt;3A. <strong>GOVERNANCE:</strong> Minimizing Risk - A Practical Approach&lt;br&gt;3B. <strong>HR:</strong> Hot Issues in Employment Discrimination&lt;br&gt;3C. <strong>FINANCIAL:</strong> Preserving Your Tax-Exempt Status: 501(c)(3) Update and Tax Tips&lt;br&gt;3D. <strong>SUSTAINABILITY:</strong> When Community Action Agencies Fall Into Trouble - What to Do When the Wolves Are at the Door&lt;br&gt;3E. Making the Grade: How to Navigate the CSBG Monitoring Review Process</td>
<td>Constitution A Back Bay A Republic Ballroom Constitution B Back Bay C Ballroom Foyer</td>
</tr>
<tr>
<td>3:30 p.m. - 4 p.m.</td>
<td><strong>Afternoon Break</strong></td>
<td>Ballroom</td>
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<tr>
<td>4 p.m. - 5:30 p.m.</td>
<td><strong>Workshop Session Four</strong>&lt;br&gt;4A. <strong>GOVERNANCE:</strong> Head Start from the CAA Perspective&lt;br&gt;4B. <strong>HR:</strong> Tackling Tricky Wage and Hour Topics&lt;br&gt;4C. <strong>FINANCIAL:</strong> Counting on Dollars and Sense: Working as a Team to Build and Manage Program Budgets&lt;br&gt;4D. <strong>SUSTAINABILITY:</strong> Working Better Together: An Exploration of Nonprofit Mergers&lt;br&gt;4E. Preparing an Online Social Media Policy: The Top Ten Legal Considerations for Your Nonprofit</td>
<td>Constitution A Republic Ballroom Back Bay C Constitution B Back Bay A</td>
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## Friday, June 21, 2013

<table>
<thead>
<tr>
<th>Time</th>
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<th>Location</th>
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<tbody>
<tr>
<td>7:30 a.m. - 12 p.m.</td>
<td><strong>Conference Information</strong></td>
<td>Ballroom Foyer</td>
</tr>
<tr>
<td>7:30 a.m. - 8:45 a.m.</td>
<td><strong>Continental Breakfast and Roundtables</strong>&lt;br&gt;<em>(see registration for topics &amp; locations.)</em></td>
<td>Ballroom Foyer Back Bay D Ballroom Foyer</td>
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<tr>
<td>7:30 a.m. - 8:45 a.m.</td>
<td><strong>Attorney Network Breakfast</strong></td>
<td>Back Bay D</td>
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<tr>
<td>8:45 a.m. - 9 a.m.</td>
<td><strong>Morning Break</strong></td>
<td>Ballroom Foyer</td>
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<tr>
<td>9 a.m. - 10:45 a.m.</td>
<td><strong>Workshop Session Five</strong>&lt;br&gt;5A. <strong>GOVERNANCE:</strong> Making a Difference: Board Leadership for Today’s CAA&lt;br&gt;5B. <strong>HR:</strong> The Ins and Outs of Managing Employee Leave&lt;br&gt;5C. <strong>FINANCIAL:</strong> Internal Controls - A Case Study Approach&lt;br&gt;5D. <strong>SUSTAINABILITY:</strong> Beyond Events: Major and Planned Giving in the Small Shop&lt;br&gt;5E. Nuts and Bolts of an Effective HR Training Program for Managers</td>
<td>Constitution A Back Bay A Republic Ballroom Back Bay C Constitution B Grand Ballroom</td>
</tr>
<tr>
<td>11 a.m. - 12 p.m.</td>
<td><strong>Closing Session:</strong> Legislative Update with David Bradley, NCAF</td>
<td>Grand Ballroom</td>
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The Agricultural and Labor Program, Inc. serves the total spectrum of socially and economically disadvantaged children and families in targeted counties in the state of Florida. Program service delivery activities are provided through the following programs:

- Head Start and Early Head Start
- Before and After School Care
- VPK School Readiness
- Low Income Home Energy Assistance (LIHEAP)
- Emergency Assistance for Farmworkers
- HUD Housing Counseling & Farmworker Rental Housing
- WIA 167 Farmworker Job Training & Placement
- CSBG Family Self-Sufficiency
- USDA Child Care Food Service
- Technical Education Training Center
- Child Care
- & More

For specific program eligibility and service center location information contact:
Phone: (863) 956-3491
Fax: (863) 956-3357
E-mail: djohnson@alpi.org

Deloris Johnson, Chief Executive Officer
William Holt, ALPI Board Chairperson

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- CSBG/ROMA
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- Life Skills Assessment
- Head Start
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**CONFERENCE SCHEDULE**

**TUESDAY, JUNE 18, 2013**

3 p.m. - 5 p.m.  **Registration and Information**  
Main Lobby

**WEDNESDAY, JUNE 19, 2013**

8 a.m. - 5:30 p.m.  **Registration and Information**  
Ballroom Foyer

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

9:30 a.m. - 11:30 a.m.  **Pre-Conference Workshops**  *with 15 minute break*

A.  **HR: Anatomy of a Workplace Dispute**

We are reprising this popular workshop presented several years ago at a CAPLAW conference with new, challenging workplace disputes. In this session, we will analyze the disputes by deconstructing them – from the first hints of trouble through the painful development into a case. Rick Pins, an experienced workplace attorney, will again present this enjoyable and highly interactive analysis of how workplace conflicts develop and how to effectively deal with them. Emphasis will be placed on practical advice for what to do (and not do) from the beginning of tensions to the full-blown “case.”

**Presenter:** Rick Pins, Esq., Leonard, Street and Deinard  
**CPE Field of Study:** Personnel/HR  
**Level:** Intermediate  
**Prerequisite:** Basic understanding of FLSA, discrimination laws, FMLA and ADA

B.  **Governance:** Developing and Using Financial Statements for Effective Leadership

Learn how CAAs are changing the ways they present financial statements to focus both board and management attention on sustainability as well as compliance. In this session, we will identify the financial information a treasurer, CFO and CEO must provide to ensure effective leadership in a rapidly shifting funding environment. Workshop topics will include: knowing what you’re looking for in your financial statements; balance sheet breakthroughs – information everyone can understand; streamlining board financial reports – why less volume yields more useful information; and meaningful budget to actual comparisons when grant periods don’t align with your fiscal year. CEOs, CFOs, board treasurers and board members are all encouraged to attend.

**Presenter:** Kay Sohl, Kay Sohl Consulting  
**CPE Field of Study:** Finance  
**Level:** Intermediate  
**Prerequisite:** Working knowledge of nonprofits’ key financial statements such as balance sheets, budgets and cash flow statements

C.  **Sustainability:** Starting a Development Program from Scratch

What if your traditional funding sources drastically reduced their financial support for your agency? Could you survive it without stressing your current programs, services and staffing? If so, you don’t need to attend this workshop. On the other hand, if you need practical, down-to-earth advice on how to diversify your funding, what elements should be in place, where to find donors, how to create a donor database, and much more, you should certainly attend this fast paced workshop. It’s taught by a fundraising pro with more than 45 years experience in nonprofit management and fundraising, who has advised several CAAs and many, many other nonprofits on getting started on the road to establishing a successful fundraising program.

**Presenter:** Jean Block, Jean Block Consulting, Inc.  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Level:** Basic
1 p.m. - 2:45 p.m. **Opening Session**  
Welcoming remarks from the CAPLAW board and opening session speakers  
Grand Ballroom

2:45 p.m. - 3:30 p.m. **Afternoon Break**  
Ballroom Foyer

3:30 p.m. - 5 p.m. **Workshop Session One**

1A. **GOVERNANCE: Board and Staff Roles - The Invisible Yellow Line**  
You know how that yellow line appears on the screen when you watch football? It marks the goal, a first down - and it keeps moving! Sitting in front of the TV at home, the line is perfectly visible, but to the players on the field, it’s invisible. In football, without careful planning before each play and communication during the play, it can be hard for the players to know what each is supposed to do to reach the goal. This workshop will explore who does what – how staff and board volunteers can successfully work together as partners to advance the mission and programs of your organization. Whether it’s planning, human resources, budgeting, fundraising or management – we’ll discuss who should do what and how to keep lines of communication open. Taught by a nonprofit pro who has been on both teams – as board and staff leader – and who will entertain and inspire.  
Presenters: Jean Block, Jean Block Consulting, Inc.  
CPE Field of Study: Specialized Knowledge & Applications  
Level: Overview

1B. **HR: Ushering in the New Normal: Changes under the Affordable Care Act**  
Changes under the Affordable Care Act have ushered in an era of a “new normal.” Over the past two years, employers have had to evaluate and comply with a number of insurance reforms and administrative changes under the Affordable Care Act, including the expansion of dependent coverage for children up to age 26, the elimination of lifetime limits on benefits, the reporting of the value of the group health plan coverage they provide to their employees, and the distribution of summaries of benefits and coverage. The big changes, however, are still on the horizon. This session will provide an overview of the most important provisions of the Affordable Care Act and their potential impact on employers with a focus on what 2014 will bring, strategic decisions that need to be considered, and the benefit of planning now.  
Presenter: Harvey Cotton, Esq., Ph.D., Ropes & Gray  
David Kirchner, Ropes & Gray  
CPE Field of Study: Personnel/HR  
Level: Update

1C. **FINANCIAL: Double Threat: Cash Flow and Compliance Challenges**  
Learn how to tell the difference between normal fluctuations of your cash position and a silent countdown to a cash flow and/or compliance crisis. In this session we will explain how to spot the early warning signs of a cash flow crisis and the compliance problems that often contribute to delayed reimbursements, monitoring findings, and demands for repayment of grant funds which decimate cash reserves. Session topics will include: compared to what – choosing the right points of comparison to monitor cash; cash flow strategies – prevention, intervention, and emergency responses; how to spot the links between cash and compliance problems; and executive director and chief financial officer roles in managing cash and compliance.  
Presenters: Kay Sohl, Kay Sohl Consulting  
CPE Field of Study: Finance  
Level: Intermediate  
Prerequisites: Basic understanding of cash flow statements
1D. **SUSTAINABILITY:** Organizational Performance Standards in Community Action

The Community Action Partnership has been tasked to coordinate the development of performance standards for the Community Service Block Grant network. The open comment period has recently ended, and the Standards will soon be submitted to HHS/ACF/OCS. This session will explore the Standards, summarize the feedback and comments received from the network, and look at initial outcomes from the pilot sites.

**Presenters:** Lindley (Lil) Dupree, Community Action Partnership
Denise Harlow, Community Action Partnership

**CPE Field of Study:** Specialized Knowledge & Applications

**Level:** Overview

1E. **Facilities Fundamentals**

Whether leased or owned, Community Action Agencies all have facilities. However, facilities and their related legal and fiscal issues are easy to take for granted until a problem arises. Worse, requirements and restrictions vary from grant program to grant program. In this workshop, learn about the common facilities related issues encountered by Community Action Agencies and how to ensure that your organization complies with legal and fiscal requirements. Topics that will be addressed include: use of federal funds, prior approval requirements, federal interests, mortgage payments, leases with related entities, repairs versus permanent improvements, and application of the Davis-Bacon Act. The workshop will also discuss procuring services and working with contractors.

**Presenter:** R. Brian Tipton, Esq., Sasser, Sefton, Tipton & Davis, P.C.

**CPE Field of Study:** Business Management & Organization

**Level:** Overview

5:45 p.m. - 7:30 p.m.  **Networking Reception**

**THURSDAY, JUNE 20, 2013**

7:30 a.m. - 5:30 p.m.  **Registration and Information**

7:30 a.m. - 8:15 a.m.  **Continental Breakfast**

8:30 a.m. - 10 a.m.  **Workshop Session Two (with 30 minute break)**

2A. **GOVERNANCE:** Putting Governance Principles into Practice

In a quest for enhanced accountability, regulators, funders, and consultants have inundated nonprofit board members in recent years with longer and longer lists of specific responsibilities and best practices. Many of them sound good in theory, but board members and executive directors are sometimes left scratching their heads as to how to really carry out all of these responsibilities in the limited time available. How does a board function in a manner that goes beyond just complying with formalities and endless checklists to adding real value to the nonprofit’s mission and operations? In this session, we will hone in on how to apply good governance principles in the real world to further the CAA's mission. We will use an interactive format, including case studies drawn from actual CAA and other nonprofit experiences, and small group discussions. The session will also include lessons learned from actual situations where the boards may not have carried out their essential functions.

**Presenters:** Anita Lichtblau, Esq., CAPLAW
Patricia Steiger, Management Consultant and CAPLAW Board Member

**CPE Field of Study:** Business Management & Organization

**Level:** Intermediate

**Prerequisites:** Knowledge of CSBG tripartite board requirements and Head Start board responsibilities
2B. HR: ADA on Trial - A Litigation Case Study Of A Failure to Accommodate Case

The obligation to accommodate disabled employees continues to expand and becomes more complex with every new statute, regulation, and court decision. With the latest emphasis on “form” as opposed to just “substance,” just trying to “do the right thing” is no longer enough. In this session, learn how to anticipate litigation challenges before there is litigation, handle common ADA issues, and best defend against ADA litigation. Find out how to think ahead to litigation when handling ADA issues. Discover how to prepare for-and respond to-common litigation challenges. Litigation topics include the discovery process, depositions and preserving evidence. ADA topics include reasonable accommodation, the interactive process, proving undue hardship, and disability discrimination.

Presenter: John Polson, Esq., Fisher & Phillips LLP
CPE Field of Study: Personnel/HR
Level: Intermediate
Prerequisite: Basic understanding of ADA requirements

2C. FISCAL: Part I - Federal OMB Grant Requirements: A Changing World
Part II - Preparing GAAP Financial Statements

Part I: Federal OMB Grant Requirements: A Changing World

In February, the Office of Management and Budget (OMB) issued proposed regulations that would combine all of the guidance for all types of federal grantees, which currently resides in multiple circulars, into one document. The “Proposed OMB Uniform Guidance: Cost Principles, Audit and Administrative Requirements for Federal Awards” would replace OMB Circulars A-50, A-102, A-110, A-21, A-87, A-122, A-89, and A-133. The new guidance would not become effective until a final rule is published by OMB and adopted by the relevant federal granting agency. There are likely to be changes in the rule before that occurs. However, given that the proposed regulation includes some significant changes in the rules, including documentation of allocation of compensation costs and lobbying, In Part I of this session we will give CAAs a heads up on the changes afoot and how to prepare for them.

Part II: Preparing GAAP Financial Statements

Part II of this session is designed to teach grant-funded organizations to be able to prepare financial statements in accordance with GAAP. Topics covered include the schedule of expenditures of federal awards, basic financial statements, typical financial statement disclosures, specific conflicts between GAAP and grant accounting, and tips on how to research and record difficult accounting issues properly. This session will also provide a brief update on new accounting standards that could affect nonprofit organizations. This session will review: The codification of GAAP and how to research tricky accounting issues; basic GAAP concepts that appear in most nonprofit financial statements; supplemental schedules and reports that are not required under GAAP but are applicable to most grant-funded organizations; areas where nonprofit agencies usually get tripped up when preparing financial statements.

Presenter: Denes Tobie, CPA, Wipfli LLP
CPE Field of Study: Finance
Level: Intermediate
Prerequisites: Working knowledge of applicable OMB circulars such as OMB Circulars A-102, A-110, A-87, A-122 and A-133 and financial statements

2D. SUSTAINABILITY: Measuring and Managing Organizational Performance in the Real World

Community Action is abuzz with new initiatives galore on enhancing the measurement and management of performance. Private and public funding sources are looking for “outcomes,” not just outputs and activities. This workshop will explore what that means at the local CAA level.

(Continued on page 12)
Hear how your organization can implement and incorporate into your operations an effective performance measurement and management system that will bring your CAA to the next level while also recognizing the limitations on resources that many CAAs face. This workshop directly focuses on how to utilize technology and data to help organizations a) understand the impact of their programs and services on their constituents, b) better address the requirements of funders, and c) inform their programs and services. Workshop attendees will also hear how these new initiatives will influence changes proposed for ROMA (Results Oriented Management and Accountability), the measurement and reporting system currently used by state CSBG offices and CAAs.

**Moderator:** Christina Sieber, Action for Boston Community Development  
**Presenters:** Barbara Mooney, National Association for State Community Services Programs, ROMA Next Generation Center of Excellence  
Terry Newhard, Northwest New Jersey Community Action Partnership  
Lisbeth (Lee) Schorr, Center for the Study of Social Policy  
Jennifer Taub, Project Hope

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

### 2E. Head Start Update

The world of Head Start continues to evolve. Join our panel for a discussion of recent changes and how the Head Start community is adapting. Special emphasis will be given to the impact of sequestration cuts, the designation renewal system, and audits. Panelists will discuss common monitoring findings, CLASS, compliance best practices, effective preparation for monitoring and responses to monitoring findings. Be sure to attend the workshop to learn about these Head Start hot topics and more.

**Presenters:** Ann Linehan, Federal Office of Head Start  
R. Brian Tipton, Esq., Sasser, Sefton, Tipton & Davis, P.C.  
Yasmina Vinci, National Head Start Association

**CPE Field of Study:** Specialized Knowledge & Applications  
**Level:** Update

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<td><strong>Morning Break</strong></td>
<td>Ballroom Foyer</td>
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<tr>
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<td><strong>Workshop Session Two</strong> <em>(continued)</em></td>
<td>Grand Ballroom</td>
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<td>12 p.m. - 1:40 p.m.</td>
<td><strong>Keynote Luncheon</strong></td>
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<td>2 p.m. - 3:30 p.m.</td>
<td><strong>Workshop Session Three</strong></td>
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**3A. GOVERNANCE:** Minimizing Risk – A Practical Approach

Find out how an effective risk management program can help your organization fulfill its mission. Examine the process a nonprofit organization needs to engage in to assess its areas of risk. More than mere checklists, this process is an interactive evaluation of sources of risk and means to reduce risk; insurance is the final backup. Learn about the board’s role in this process. Leave with new ideas about how to safeguard your organization and its assets.

**Presenter:** Fred Marx, Esq.  
**CPE Field of Study:** Business Management & Organization  
**Level:** Overview
3B. **HR: Hot Issues in Employment Discrimination**

The Equal Employment Opportunity Commission’s (EEOC) interpretation and application of discrimination laws is constantly evolving - are you keeping up-to-date? Join this session and hear about the latest developments in workplace discrimination laws and their practical impact on CAAs. Topics include: the use of criminal background checks and credit information in job applicant screening; reduction in workforce (RIF) selection policies; personnel policies and much more.

**Presenter:** Doug Brayley, Esq., Ropes & Gray  
**CPE Field of Study:** Personnel/HR  
**Level:** Update

3C. **FINANCIAL: Preserving Your Tax-Exempt Status: 501(c)(3) Update and Tax Tips**

This workshop will provide an update on the constantly changing tax requirements for 501(c)(3) organizations, including changes to the Form 990, payroll tax credits, and IRS 403(b) plan audits. We will also explore other tax compliance matters affecting 501(c)(3)s, including: employee vs. independent contractor issues; grants to non-501(c)(3) organizations, and unrelated business income tax case studies.

**Presenter:** Jeanne Schuster, Esq., Ernst & Young  
**CPE Field of Study:** Taxes  
**Level:** Update

3D. **SUSTAINABILITY: When Community Action Agencies Fall Into Trouble - What to Do When the Wolves Are at the Door**

Crises have a way of focusing our attention. This session will provide participants with information about how one troubled CAA addressed the challenges and hardships arising from a leadership crisis that almost put it out of business. Using many of the most important actors in the drama it will offer lessons and roadmaps to help CAA staff and boards, and state officials, assess and address similar crises and emerge renewed and stronger than ever. Special emphasis will be given to audience discussion and participation.

**Presenters:** Gerald Bell, Massachusetts Department of Housing and Community Development  
Christian Dame, Non-Profit Transitions LLC  
Evelyn Friedman, Greater Lawrence Community Action Council, Inc.  
Dr. Thomas S. Perrault, Sr., Greater Lawrence Community Action Council, Inc.  
**CPE Field of Study:** Business Management & Organization  
**Level:** Overview

3E. **Making the Grade: How to Navigate the CSBG Monitoring Review Process**

Taking a proactive approach to the CSBG monitoring process will place a CAA on the road to becoming a healthier and stronger organization. In this session, we will discuss the CSBG monitoring process from the perspective of both the state CSBG office and the CAA. We will focus on the actions a CAA can take to affect its success in a monitoring before it is even selected by its state CSBG office for a review. We will use sample documents to explore ways a CAA should think about and respond to a state's monitoring findings along with approaches for addressing some commonly-faced findings. We will discuss the federal CSBG Act requirements relating to training and technical assistance and quality improvement plans as well as the complaint process a CAA may use when it believes that its state CSBG office has failed to comply with the Federal CSBG Act.

**Presenters:** William Hunter, Northeast Institute for Quality Community Action  
Allison Maluf, Esq., CAPLAW  
Ditzah Wooden-Wade, Massachusetts Department of Housing and Community Development  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Level:** Overview
**CONFERENCE SCHEDULE**

**THURSDAY, JUNE 20, 2013 (CONTINUED)**

<table>
<thead>
<tr>
<th>Time</th>
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<tr>
<td>3:30 p.m. - 4 p.m.</td>
<td><strong>Afternoon Break</strong></td>
<td>Ballroom Foyer</td>
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<tr>
<td>4 p.m. - 5:30 p.m.</td>
<td><strong>Workshop Session Four</strong></td>
<td>Constitution A</td>
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</tbody>
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**4A. GOVERNANCE: Head Start from the CAA Perspective**

Join two veteran CAA executives who have both been Head Start Directors share their strategies for strong, effective relationships among the Policy Council, the Board of Directors, and staff in the operation and governance of the Head Start program. They will discuss how to fully integrate the Head Start program into the CAA and how to prepare for a successful Head Start review, which both have recently completed.

**Presenters:** Pat Daly, South Shore Community Action Council  
Sharone Scott Chandler, Action for Boston Community Development  

**CPE Field of Study:** Specialized Knowledge & Applications  
**Level:** Intermediate  
**Prerequisites:** Basic understanding of Head Start requirements

**4B. HR: Tackling Tricky Wage and Hour Topics**

Test your wage and hour prowess by working through several scenarios that address some of the trickier federal Fair Labor Standards Act (FLSA) issues faced by Community Action Agencies (CAAs). This practical look at the FLSA will aid CAAs in discovering ways to reduce wage and hour law liability. We will focus on alternative employment arrangements in tough economic times such as furloughs and reductions in an employee’s pay and hours; properly differentiating between employees v. independent contractors; accurately classifying exempt employees, in particular administrative staff and Head Start teachers; determining training and travel time for non-exempt employees without running afoul of FLSA requirements; and complying with the salary basis requirement by avoiding impermissible deductions that can jeopardize an employee’s exempt status.

**Presenter:** Rick Pins, Esq., Leonard Street and Deinard  
**CPE Field of Study:** Personnel/HR  
**Level:** Intermediate  
**Prerequisites:** Basic understanding of FLSA requirements

**4C. FINANCIAL: Counting on Dollars and Sense: Working as a Team to Build and Manage Program Budgets**

Preparing and managing a realistic and effective budget for a Community Action program is neither an easy nor solo task. It requires finance and program staff to work closely together and provide critical financial and programmatic information essential for success. In this session, we will outline the roles and responsibilities of the finance and program staff in the budget process; discuss the information each needs to provide the other; walk through preparing a budget proposal; learn how to develop a tracking budget from a proposed budget and discuss budget revisions and reports. Throughout the session we will also explain key legal requirements essential for creating and maintaining an effective and compliant program budget. We encourage both finance and program staff to attend.

**Presenters:** Tabitha Gaston, Action for Boston Community Development, Inc.  
Marjorie Lombard, Action for Boston Community Development, Inc.  

**CPE Field of Study:** Finance  
**Level:** Overview
4D. **SUSTAINABILITY:** Working Better Together: An Exploration of Nonprofit Mergers

Faced with government budget cuts and increased competition for funding, many nonprofits are exploring mergers as one way to further their missions, enhance their fiscal health, and increase their efficiency and effectiveness. In this session, we will look at reasons why nonprofits merge, key factors for successful mergers, and alternatives to mergers. Guided by executives from two Community Action Agencies that recently completed mergers, we will also walk through the merger process and examine the practical and legal considerations involved, including unique issues associated with government funding.

**Presenters:** Eleanor Evans, Esq., CAPLAW  
Gale Hennessy, Southern New Hampshire Services  
Michael Tarpinian, The Opportunity Alliance

**CPE Field of Study:** Business Management & Organization  
**Level:** Overview

4E. **Preparing an Online Social Media Policy: The Top Ten Legal Considerations for Your Nonprofit**

Virtually every nonprofit organization these days uses online social media. In different ways, for sure, and some use social media more frequently or more effectively than others. But what every nonprofit should have, as most do, is an online social media policy. One that regulates the use of social media by the organization’s employees – both for personal use and on behalf of the nonprofit – and that governs use by members, supporters, and other non-employees. This program will highlight the most important legal considerations to keep in mind when developing or updating your nonprofit’s online social media policy, like: whether and how to require applicants and employees to provide personal social media access to the nonprofit; whether and how to take adverse actions based on the findings; proper intellectual property usage by employees, members, and others; and federal labor law-based restrictions on the nonprofit’s right to regulate employee social media use.

**Presenter:** Lisa Hix, Esq., Venable, LLP

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

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**FRIDAY, JUNE 21, 2013**

7:30 a.m. - 12 p.m.  
**Conference Information**  
Ballroom Foyer

7:30 a.m. - 8:45 a.m.  
**Continental Breakfast and Roundtables**  
*(see registration for topics & locations.)*  
Ballroom Foyer

7:30 a.m. - 8:45 a.m.  
**Attorney Network Breakfast**  
Back Bay D

7:30 a.m. - 8:45 a.m.  
**State Association Networking Breakfast**  
Back Bay B

8:45 a.m. - 9 a.m.  
**Morning Break**  
Ballroom Foyer

9 a.m. - 10:45 a.m.  
**Workshop Session Five**  
Constitution A

5A. **GOVERNANCE:** Making a Difference: Board Leadership for Today’s CAA

Both public and nonprofit Community Action Agency boards of directors have a multifaceted governance role in their communities. To meet their full board obligation, board members must understand and comply with their legal roles and responsibilities; be able to manage, organize, and operate a complex yet functional governing body; understand the current fiscal status of local, state and federal governments; and focus the agency’s resources on the Community Action mission of alleviating poverty in what is an extremely challenging policy environment.

*(Continued on page 16)*
In this session, we will examine current challenges facing Community Action Agencies, look at common characteristics of sustainable, high-performing organizations, review key responsibilities of CAA boards, discuss the CAA board’s role in helping the organization meet today’s challenges, and suggest strategies to ensure that the board functions well and that board meetings matter. Throughout the presentation we will discuss how CAPLAW’s resource Tools for Top-Notch CAAs: A Practical Approach to Governance and Financial Excellence can help board’s govern more effectively and also how ROMA requirements intersect with a CAA boards’ key responsibilities.

Presenters: Denise Harlow, Community Action Partnership
Allison Ma’luf, Esq., CAPLAW
Michael Shepsis, Esq., CAPLAW

CPE Field of Study: Business Management & Organization
Level: Overview

5B. HR: The Ins and Outs of Managing Employee Leave

Keeping tabs on who will be in the office and who will be out on any given day can be a struggle for employers who are regularly faced with issues stemming from employees’ requests for leave or accommodation. This session is intended to help employers address thornier leave issues under the Family and Medical Leave Act (FMLA) and the Americans with Disabilities Act (ADA) and explain how these two major leave laws interact with each other. Using scenarios, we will discuss practical approaches to a variety of leave issues relating to an employer’s obligations; calculating leave time; reduced and intermittent leave options; light duty assignments and restoration rights; and reasonable accommodations.

Presenter: Chris Powell, Esq., Ropes & Gray
CPE Field of Study: Personnel/HR
Level: Intermediate
Prerequisites: Working knowledge of and experience administering leave laws

5C. FINANCIAL: Internal Controls - A Case Study Approach

How do you know if your internal controls are good enough? Would they really keep you in compliance before a review finds a problem? If your agency lost one or more key management personnel, would your internal controls highlight where you are vulnerable? Join us and follow a case study of “CAP USA” an agency where everything seemed to be running fine, even with cutbacks, until a monitor found a problem, then two...

Presenter: Dan Miller, CPA, Meliora Partners, Inc.
CPE Field of Study: Finance
Level: Intermediate
Prerequisite: Understanding of and experience with nonprofit financial operations, management and reporting.

5D. SUSTAINABILITY: Beyond Events: Major and Planned Giving in the Small Shop

Your organization does pretty well with special events, direct mail, and has even delved into on-line fund raising. But for all that effort, you are still not receiving the kinds of large, transformational gifts that will dramatically increase your program’s impact. Learn the keys to successful, sustainable major gift and planned giving programs, scaled to work in your organization and ways to integrate the best practices from higher education and health care fundraising in your organization so that you can create a larger return on your fundraising dollar.

Presenter: Catherine Crooker, Community Action (of Washington County)
CPE Field of Study: Specialized Knowledge & Applications
Level: Overview
5E. Nuts and Bolts of an Effective HR Training Program for Managers

HR management training is an important part of ensuring that your organization complies with the ever-growing number of labor and employment laws. Providing supervisors with periodic management training regarding employment law is critical to defending litigation over employment issues. Oftentimes, one of the first questions in an employment lawsuit is: “What have you done to train your supervisors regarding employment laws?” In this highly interactive session, you will learn the essential elements of HR management training, and then you will go through a basic management training program yourself so that you know exactly what your supervisors need to learn from training. The management training portion of the program will cover hiring, discipline, performance evaluation, termination, and investigating complaints.

Presenters: Tillman Coffey, Esq., Fisher & Phillips
John Polson, Esq., Fisher & Phillips
CPE Field of Study: Personnel/HR
Level: Overview

11 a.m. - 12 p.m. Closing Session
Legislative Update: David Bradley, Executive Director, National Community Action Foundation
Legal direction and judicious organizational management are critical to maintaining the capability and capacity of the Community Action Network.

The Region VIII Community Action Partnership supports efforts by CAPLAW to strengthen the organizational soundness of all CAAs throughout the network.
Region X

extends a sincere thanks to the CAPLAW staff and their partners who put a great deal of energy and effort into creating a successful 2013 CAPLAW Conference in Boston.

PACIFIC NORTHWEST COMMUNITY ACTION ASSOCIATION

Lisa Stoddard, President
Jerralynn Ness, CAPLAW Board Member
JEANNIE CHAFFIN, OPENING SESSION SPEAKER

Ms. 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.

AARON GORNSTEIN, OPENING SESSION SPEAKER

Governor Patrick appointed Mr. Gornstein to serve as the Undersecretary for Housing and Community Development in December 2011, and he started his new position on January 31, 2012. Mr. Gornstein oversees the Department of Housing and Community Development, which administers nearly $1 billion in state and federal funds for a variety of programs for affordable housing production, community development, municipal assistance, local and regional planning, energy conservation, rental assistance, public housing, and others. He also serves as the chief housing policy advisor to the Secretary of Housing and Economic Development and to the Governor, and serves as Chairman of the Community Economic Development Assistance Corporation, which provides technical and financial assistance to non-profit developers of affordable housing.

Prior to his recent appointment, Mr. Gornstein served as the Executive Director of Citizens’ Housing and Planning Association (CHAPA) from 1990 to January 2012. CHAPA is a private, non-profit research and advocacy organization working on affordable housing and community development issues in Massachusetts. During his tenure, CHAPA spearheaded the passage of major state and federal legislation and program reforms, conducted important research studies, sponsored hundreds of training’s for practitioners, organized new coalitions that connect affordable housing to other policy areas, and launched programs to increase home-ownership and rental opportunities for low and moderate income residents.

Prior to becoming Executive Director of CHAPA, Mr. Gornstein was a neighborhood planner for the City of Cambridge, Massachusetts and the director of housing for the Tri-City Community Action Program, a community agency in Malden, Massachusetts. He received his undergraduate degree from the University of Wisconsin--Madison and his graduate degree from Tufts University’s Department of Urban and Environmental Policy.

LISBETH SCHORR, OPENING SESSION SPEAKER

Lisbeth B. (Lee) Schorr is a Senior Fellow of the Center for the Study of Social Policy, where she works with colleagues on efforts to broaden the understanding of evidence as applied to the design and evaluation of complex initiatives. She is also a member of the Executive Committee of the Aspen Institute’s Roundtable on Community Change, of the Institute of Medicine (the National Academies of Science), and of the Board of the SEED Foundation.

Ms. Schorr is the author of two books, WITHIN OUR REACH: Breaking the Cycle of Disadvantage and COMMON PURPOSE: Strengthening Families and Neighborhoods to Rebuild America.
ELLEN TELLER ESQ., KEYNOTE CONVERSATION

As director of government affairs, Ms. Teller directs the development and implementation of the Food Research and Action Center’s (FRAC) legislative agenda. Working with Congress, national organizations, and FRAC’s diverse state and local grassroots field network, Ellen advocates for improved access and participation to domestic anti-hunger programs for low-income individuals and families.

Ellen joined FRAC in 1986 as a staff attorney and had previously worked at the American Bar Association’s Section on Individual Rights and Responsibilities, the Center for Science in the Public Interest and the Consumer Federation of America.

Ellen has a BA in Political Science and English Literature from the State University of New York, College at Oneonta, and a JD from Western New England College School of Law. She is a Member of the DC Bar and serves on the Boards of the Coalition on Human Needs (Chair); Manna Food Center, Rockville, Maryland; ActionAid USA; and the Bill Emerson Hunger Fellows Advisory Committee, Congressional Hunger Center. Honors include: National WIC Association Leadership Award, 2006; Commodity Supplemental Food Program Association Award, 2003 & 2010; and the Congressional Hunger Center Emerson Fellows’ Fairy Godmother Award, 2008.

DON MATHIS, KEYNOTE CONVERSATION

Mr. Mathis is President/CEO of the Community Action Partnership, a Washington, DC-based national organization representing the interests of 1,000 Community Action Agencies across America that fight poverty on the local level. Mr. Mathis joined the Partnership in July 2007.

Mr. Mathis provides leadership and guidance to CAAs and oversees the development and implementation of several anti-poverty initiatives, including Rooting Out Poverty: A Campaign by America’s Community Action Network. He is also responsible for raising the visibility of Community Action through strategic branding, marketing, and public relations approaches; establishing new collaborations, and advocating for the 38 million Americans living in poverty.

Mr. Mathis came to the organization following ten years as Executive Director of the Boys & Girls Clubs of Harford County, Maryland. While at the Boys & Girls Clubs, he served as board chairman of the Maryland Rural Development Corporation, a Partnership member agency. Mr. Mathis has also held senior positions at the federal Corporation for National and Community Service, the National Association of Service and Conservation Corps, the National Network for Youth, the National Youth Employment Coalition, and the Pennsylvania Conservation Corps. He began his career as a Head Start volunteer at the Community Action of Greater Wilmington in Delaware, and subsequently became a Head Start teacher and director. He received a bachelor’s degree from East Stroudsburg State College (PA) and did graduate work at the University of Delaware.

DAVID BRADLEY, LEGISLATIVE UPDATE 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.
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CAPLAW BOARD MEMBER BIOGRAPHIES

WINSTON A. ROSS, ACSW, CCAP, PRESIDENT

Mr. Ross 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.

DAVID BRIGHTBILL, VICE PRESIDENT

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.

GALE F. HENNESSY, CCAP, TREASURER

Mr. Hennessy 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.

JERRALYNN NESS, CCAP, SECRETARY

Ms. Ness is Executive Director of Community Action serving Washington County. She has been with Community Action since 1973 and has been 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. She has dedicated her life to eradicating poverty, with the mission of helping low-income families achieve economic security. In addition to her role as CAPLAW Board Member, Ms. Ness 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.
PATRICIA A. STEIGER, CCAP
Ms. Steiger 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.

CATHERINE CAPUTO HOSKINS, CCAP,
Ms. Hoskins has been Executive Director of the Salt Lake Community Action Program (SLCAP) for over 15 years. She 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.

DOUGLAS D. RAUTHE
Mr. 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, EMERITUS
Mr. Dawson 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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GERALD BELL

The Department of Housing and Community Development’s (DHCD) mission is to strengthen cities, towns and neighborhoods to enhance the quality of life of Massachusetts residents. Mr. Bell is the Director of the Community Services Unit (CSU) at DHCD. The CSU administers the Community Services Block Grant (CSBG), the Low-Income Home Energy Assistance Program (LIHEAP), Individual Development Accounts (IDA), and the Neighborhood Housing Services (NHS) program. He has a Masters in Theology from the Newton Theological School and a Bachelors of Science from Tennessee State University. Mr. Bell serves on several boards, including the CSI-USA (Christian Solidarity International) as well as the Whittier Street Community Health Center in Roxbury, MA, where he serves as the Vice Chair of the Community Board. Mr. Bell was also selected to the Commonwealth’s Leadership Excellence for Senior Management in 2013.

JEAN BLOCK

Ms. Block is a nationally recognized speaker, trainer and consultant on nonprofit management, FUNdraising, board development and social enterprise. She has more than 45 years experience in the nonprofit sector as both board and staff. Ms. Block has written 3 nonprofit books: “FUNdraising! 180+ Great Ideas to Raise More Money,” “The ABCs of Building Better Boards,” and Fast FUNdraising Facts for Fame & Fortune.” Two more books will be published in 2013. Visit her web site at www.jblockinc.com to learn more, sign up for her free newsletter and download free useful forms.

DOUG BRALEY, ESQ.

Mr. Brayley joined the law firm, Ropes & Gray, in Boston in 2010 as an Associate in the Labor and Employment Department. Previously, he served as a law clerk for the Honorable Jeffrey Sutton. Mr. Brayley counsels employers on a wide variety of labor and employment matters, including harassment and discrimination, employee discipline, non-compete and trade secret provisions, compliance with state and federal employment and labor laws, and labor relations. He has experience in dispute resolution before courts, administrative agencies and arbitrators. Mr. Brayley has played a noteworthy role in drafting briefs and motions to the U.S. Supreme Court, federal Courts of Appeals, and multiple federal district and state courts. Mr. Brayley has advised in several internal investigations at large companies and prominent non-profit organizations, interviewing witnesses, offering legal risk assessments, and coordinating with PR professionals. Mr. Brayley also has experience advising clients on labor and employment issues relating to mergers and acquisitions, including the drafting of employment agreements. He is a graduate of Indiana University and Harvard Law School.

TILLMAN COFFEY, ESQ.

Mr. Coffey is a partner in the Atlanta office of the law firm Fisher & Phillips, LLP. He joined the legal profession with 15 years of real world experience working in jobs ranging from supervisor in a lead smelter blast furnace to working as a cloth spreader in a garment factory. This experience has been an invaluable tool in understanding employees, workplace issues, and in providing practical advice. Mr. Coffey’s practice focuses on the defense of employment discrimination complaints in court and before the Equal Employment Opportunity Commission and various state commissions. Mr. Coffey’s also advises clients on the preventive measures they can take to minimize liability. In addition, Mr. Coffey provides training to management and speaks to groups and associations on many labor and employment law topics, including effective hiring, discipline and discharge, disability law, sexual harassment, wage and hour law, and family and medical leave. He is a graduate of Middle Tennessee State University and University of Tennessee College of Law.

HARVEY COTTON, ESQ., PH.D.

Mr. Cotton, a Principal at the law firm Ropes & Gray in the Boston office, represents a wide range of employers, both tax-exempt and for-profit, on all aspects of health and welfare benefits matters. Mr. Cotton advises clients on the design, drafting, and administration of employee health and welfare plans, with a particular focus on compliance with ERISA, COBRA, HIPAA, and the ACA and the establishment and maintenance of section 125 cafeteria plans. Mr. Cotton has spoken and written about the Affordable Care Act and state health care reform and he counsels employers about the impact of reform on their group health plans. He also advises employers on the wide array of health care coverage options available to them, including review and selection of high-deductible health plans, health reimbursement accounts, and health savings accounts, as well as options available to Medicare-eligible employees and retirees. He holds a Bachelor’s degree in philosophy and economics from Colombia University, a law degree from Boston University School of Law and a Ph.D. in Law, Policy and Society from Northeastern University.
CATHERINE CROOKER
Ms. Crooker recently joined Community Action in Hillsboro, Oregon bringing over 20 years' successful fundraising experience in higher education and health care. She is honored to use her skills in planned giving and major gifts, as well as her entrepreneurial approach, to help Community Action broaden its impact and help improve the lives of families transitioning out of poverty. Ms. Crooker worked most recently in higher education at Lewis & Clark College in Portland, Oregon, where she managed a 30-member team of development professionals raising an average of $8 million per year.

PATRICIA DALY
Ms. Daly has been the Executive Director of the South Shore Community Action Council, Inc. (SSCAC) in Plymouth, Massachusetts since 1994. During her tenure at SSCAC, she has served as Developer – purchasing land and buildings, or leasing and renovating five different SSCAC, Inc. locations. Prior to her community action career, Ms. Daly served as a Head Start Director and worked for the Commonwealth of Massachusetts and the State of Florida. She has long been an advocate for low-income children, serving on numerous statewide task forces and committees. Now she advocates for children, the elderly, and the low-income community as a whole on a variety of issues. In the past, she has served as a member of the board of directors for the Plymouth (MA) Area Chamber of Commerce and as President of the MASSCAP Association and the Greater Plymouth Council of Human Service Providers. Ms. Daly is a member of the South Shore Workforce Investment Board. She earned her B.A. at Stonehill College and completed advanced studies in Management at Bridgewater State University.

CHRISTIAN DAME
Mr. Dame is the President & Founder of Non-Profit Transitions LLC and recently completed his term as Interim Director for Greater Lawrence Community Action Council Inc. (GLCAC). Mr. Dame is a professional Interim Executive Director. He has a Masters in City Planning degree from Harvard Graduate School of Design, has served in local and state government, and has been an independent consultant since 1986. He served as Interim Executive Director at a number of nonprofits in Rhode Island and Massachusetts, including the New England Shelter for Homeless Veterans in Boston; Progresso Latino in Central Falls, Rhode Island; South Shore Housing Development Corporation in Kingston, Massachusetts; and Rainbow Child Development Center in Worcester. In September, 2012 he returned to his consulting practice helping nonprofits with transition issues.

LINDLEY (LIL) DUPREE
Ms. Dupree joined Community Action in 2005 at Community Action Partnership of NW Montana. Previously Ms. Dupree worked in small business, banking, investment analysis and community economic development. While at Community Action Partnership of NW Montana, she served as a grant writer, development director and development officer. She joined the Community Action Partnership in Washington, DC in 2010 as the Director of Training and Technical Assistance. She is a certified Results Oriented Management and Accountability (ROMA) trainer and a Certified Community Action Professional. She manages the Partnership’s T&T department, overseeing learning sessions, workshops, and resources for the Partnership’s network of 1,000 Community Action Agencies. Current projects include the Organizational Standards Center of Excellence, the National Leadership Development Center of Excellence, the National Training Center, and the Pathways to Excellence/Award for Excellence programs.

ELEANOR EVANS, ESQ.
Ms. 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.
EVELYN FRIEDMAN
Ms. Friedman is the new, permanent Executive Director of Greater Lawrence Community Action Council, Inc. (GLCAC), a non-profit social services agency that annually assists 29,000 individuals. Since September 2012, Ms. Friedman has overseen a $20 million operating budget, about 250 employees, and 18 individual programs targeting obstacles that block families from achieving economic self-sufficiency. Ms. Friedman came to Lawrence with 25 years of experience managing non-profit and governmental organizations. She is the former Director of the Department of Neighborhood Development for the City of Boston, where she supported the development of businesses and housing with a $100 million budget. For 18 years, she served as Executive Director of Nuestra Comunidad Development Corporation in Roxbury, where she rejuvenated a failing organization into one managing 800 units of rental housing and 65,000 square feet of commercial space. Ms. Friedman holds a master’s degree in sociology from Boston College and a bachelor’s degree in sociology from the University of Massachusetts. She has served on numerous boards and professional committees, including the Governor’s Homelessness Prevention Task Force, the Federal Reserve Bank of Boston’s Community Advisory Board, and the Investment Committee of the Massachusetts Housing Investment Corporation.

TABITHA GASTON
Ms. Gaston is the Director of Housing and Homelessness Prevention for Action for Boston Community Development (ABCD). She has worked for ABCD for over 12 years in various roles. She is a graduate of Suffolk University and University of Massachusetts-Boston.

DENISE HARLOW, MSW, CCAP
Ms. Harlow is the Project Director for the National Training Center at the Community Action Partnership and key staff to the Organizational Standards Center of Excellence. Ms. Harlow has more than 23 years of experience in the nonprofit and governmental sectors. Prior to her tenure at the Partnership, she served as the CEO for the New York State Community Action Association and was the Sr. Vice President for Capacity Building at the New York Council of Nonprofits. Ms. Harlow has experience in governance, strategic planning, financial oversight, public policy/advocacy, and organizational development and has served on several 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 Bachelor Degree in Social Work from Valparaiso University.

LISA HIX, ESQ.
Ms. Hix is Of Counsel at the law firm Venable LLP in the Washington, D.C. office. She concentrates her practice on counseling charities, trade and professional associations, and other nonprofits on a wide range of legal topics, including tax exemption, intellectual property, corporate governance, and antitrust, among others. Ms. Hix has broad experience in the nonprofit sector, having served in various capacities at nonprofit organizations, including as the Founding Executive Director of the Memorial Institute for the Prevention of Terrorism (MIPT) and Development Director of East Harlem Block Schools. She is a graduate of Smith College and Duke University School of Law.

BILL HUNTER
Mr. Hunter is the Executive Director of the Northeast Institute for Quality Community Action. He has 42 years of direct service and executive management experience in Nonprofit organizations. Mr. Hunter received a Bachelor’s Degree from the University of Michigan and a Masters Degree in Social Work from Boston College.

DAVID KIRCHNER
Mr. Kirchner is a Principal in the Ropes & Gray Benefits Consulting Group in Boston. Prior to joining Ropes & Gray, he was a Senior Account Manager for a major life insurance company’s Employee Benefits Division in Boston, Providence, Rhode Island, and Dallas, Texas. Mr. Kirchner has worked with pension, welfare benefit and executive compensation plans. Mr. Kirchner has taught the Life & Health CEBS course at Brown University in Providence, Rhode Island, has been a guest lecturer at the Carroll School of Management, Boston College, and has periodically provided instruction for the New England Employee Benefits Council. He is a graduate of Westminster College.
Anita Lichtblau, Esq.
Ms. 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.

Ann Linehan
Ms. Linehan currently serves as the Deputy Director of the Office of Head Start, where she provides consultation to the Director on all matters of Head Start management and operations. She provides oversight and guidance to the Regional Program Managers and is a frequent speaker at Head Start conferences around the country. Prior to becoming Deputy Director, Ms. Linehan held a variety of management positions at the Office of Head Start including Grants and Contracts Division Director, Acting Quality Assurance Division Director, and Program Management Division Director. She began her Head Start career more than 25 years ago as Executive Director of a Head Start and child care agency outside of Boston, Massachusetts. In 1992, she joined the Federal government to work in Region I as the Program Manager for Head Start, focusing on the monitoring process to address key quality issues. Ms. Linehan earned her B.A. in Sociology and Psychology and her M.Ed. from Boston State College.

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

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

Frederic Marx, Esq.
Mr. Marx is a Partner at Hemenway & Barnes LLP in Boston. Mr. Marx provides corporate, public charity, regulatory, charitable giving and tax advice to clients which include health care, cultural and educational nonprofit organizations. He served two terms as Chairman of the Business Law Section of the Massachusetts Bar Association and two terms as Chairman of its Nonprofit Organization Committee. Mr. Marx currently serves as a member of the Steering Committee of the Tax Exempt Organization Committee of the Boston Bar Association. He has been appointed by the Attorney General to be a member of that office’s Advisory Committee on Public Charities. Mr. Marx is also the editor of the two volume treatise, Massachusetts NonProfit Organizations. He is a graduate of Haverford College and Boston University School of Law.
FACULTY BIOGRAPHIES

DAN MILLER, CPA
Mr. Miller is the Chief Financial Officer of Meliora Partners, Inc., a team of financial and management specialists that has provided training and technical assistance services to Community Action Agencies and state CSBG offices since 1999. He has been involved with Meliora for 12 years and has trained on OMB Circulars and best financial management practices in 25 states. He has served as interim financial director in many community action agencies for periods of weeks to months. Mr. Miller has experience with multiple financial software packages and is familiar with a variety of federal and state funded programs. He has served as a services specialist for Mid-Iowa Community Action’s (MICA) Peer-to-Peer program and as a fiscal trainer for National Community Action Management Academy (NCAMA). Mr. Miller has special expertise in cost accounting systems and housing tax credits. He holds a Bachelor’s Degree in Accounting.

BARBARA MOONEY, PH.D.
Dr. Mooney is the Training Director at the Community Action Association of Pennsylvania (CAAP). She serves as Project Director of the National Peer to Peer (NPtP) ROMA Training Network and is a Research Fellow, working with NASCSP’s “ROMA Next Generation Center of Excellence.” Dr. Mooney also serves as consultant to the Temple University National Family Development Board and Adjunct Professor at Waynesburg University. She has conducted numerous research and evaluation projects for both private and government funded programs and services. Dr. Mooney came to the CAAP after 18 years in a local CAA in Pennsylvania as the Director of Family Development. Prior to becoming involved in the CAA network, she worked with Catholic Charities, a regional public library system, and Adult Education Programs. Dr. Mooney worked in NYC as a casework supervisor (Department of Welfare), community organizer (Department of Human Services) and as a substitute teacher.

TERRY NEWhardt
Mr. Newhardt has been with Northwest New Jersey Community Action Partnership (NORWESCAP) since 1980 and the CEO since 1983. Under his leadership, the agency has grown from delivering service in three counties to six and the budget has grown from 1.5 million to 44 million dollars of community investment. His vision is to change the social and intellectual perception of poverty in NWNJ. His three core values are: being a great dad, making a difference in the community and having fun. Mr. Newhardt says, “Community action is in my blood. There is no better way to serve our neighbors.” The agency has been recently recognized with the NJ BIZ Innovation award and listed in the top 50 nonprofits to work for in the US.

THOMAS S. PERRAULT, SR.
Dr. Perrault has served on the Greater Lawrence Community Action Council (GLCAC) board for over 35 years. When it was designated a troubled agency in March 2011, he became the Board President. Working with the remnants of the board and the Massachusetts Department of Housing and Community Development (DHCD), he hired professional Interim Executive Director Christian Dame. Together they turned a troubled agency into a model agency in a little over a year. Dr. Perrault is a graduate of Northeastern University and Palmer College of Chiropractic, and has been a practicing chiropractor for 51 years. He has served as Executive Vice President of the Massachusetts Chiropractic Society for over thirty years, was named Massachusetts Chiropractor of the Year an unprecedented four times, and received its first Lifetime Achievement Award. He is a Rotary Paul Harris Fellow, a Distinguished Fellow of the Palmer Academy and the International Chiropractors Association, and President of the Chiropractic Foundation.

RICK W. PINS, ESQ.
Mr. Pins is a shareholder at the law firm Leonard, Street and Deinard in its Labor and Employment law practice groups. 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 Equal Employment Opportunity Commission (EEOC). Mr. Pins 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, Family and Medical Leave Act (FMLA), discrimination, hiring, discipline, separation, privacy, background checking, record keeping and workplace violence. He also counsels clients on compliance with state and federal prevailing wage laws and transportation regulations. Mr. Pins frequently trains supervisors and employees on the basics of employment law, positive employee relations and preventing workplace harassment and discrimination. An MSBA Certified Labor and Employment Law Specialist, he has represented management in numerous collective bargaining negotiations, and in strikes and other labor disputes. He has been regularly selected for inclusion in both Super Lawyers® and Top 40 Employment Super Lawyers®. He is a graduate of the University of Wisconsin-Madison and University of Minnesota School of Law.
JOHN POLSON, ESQ.
Mr. Polson is a Partner at the law firm 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. He is a graduate of University of South Florida and Loyala School of Law.

CHRIS POWELL, ESQ.
Mr. Powell joined Ropes & Gray as an Associate in the Labor and Employment Department in 2006 in Boston. Mr. Powell’s practice focuses on advising and representing clients on a wide variety of labor, employment and executive compensation matters. He regularly counsels employers concerning a broad range of issues including employee hiring, discipline and discharge, wage and hour compliance, employment policies and the protection of confidential information and trade secrets. In addition, he has successfully handled sexual harassment and other discrimination claims, wrongful discharge, non-competition and other litigation in state and federal courts, as well as in public hearings before administrative agencies such as the Massachusetts Commission Against Discrimination and the National Labor Relations Board. He is a graduate of Ohio State University and Northeastern University School of Law.

JEANNE SCHUSTER, ESQ.
Ms. Schuster is an Executive Director and the New England Area Exempt Organizations Tax Functional Leader at Ernst & Young LLP specializing in tax exempt organizations. She has over 15 years experience with tax exempt organizations including representation during IRS and state audits, IRS CEP (Team) examinations, mergers and reorganizations of exempt and taxable corporations, applications for exempt status, unrelated business income tax, employment tax, information reporting and sales tax issues. Ms. Schuster has a B.S. in accounting from Bentley, a J.D. from the New England School of Law, and, an LL.M. from Boston University School of Law. She also teaches a course in Tax Exempt Organizations at Suffolk University as part of their adjunct faculty.

SHARON SCOTT–CHANDLER, ESQ.
Ms. Scott-Chandler fills the number two position at ABCD, playing a key role in overseeing ABCD’s wide array of human services programs. A vital member of the ABCD leadership staff since 1999, she served as Vice President, ABCD Head Start and Children’s Services, since 2003. In that position she provided leadership to the $30 million citywide ABCD Head Start program serving 2,400 low-income, pre-school children and their families in 24 centers. In 2007, Governor Deval Patrick named Ms. Scott-Chandler Chair of the Board of the Massachusetts Early Education & Care Department, the primary vehicle for top-level policy and funding decision making affecting the state’s 240,000-plus pre-school children and their families. From 1999 to 2003, Ms. Scott-Chandler headed ABCD Child Care Choices of Boston (CCCB), the Child Care Resource and Referral Agency (CCRA) for Boston, and surrounding cities. Prior to joining ABCD, Ms. Scott-Chandler served as an Assistant Attorney General for the Commonwealth of Massachusetts, as an associate at the Morrison, Mahoney & Miller law firm in Boston, and as a legislative aide to U.S. Congressman Sidney R. Yates. Ms. Scott-Chandler received her law degree from Northeastern University Law School and her bachelor’s degree in political science from Tufts University. She is a member of the Board of Directors for Project Hope, Northeastern School of Law Alumni Association, and the Massachusetts Black Lawyers’ Association, among others.

CHRISTINA SIEBER
Ms. Sieber is currently the Director of Institutional Advancement for Action for Boston Community Development, Inc. (ABCD). She has served in leadership positions in planning, fundraising and program development at ABCD for over 15 years. During this period she conducted strategic planning for this $130-million agency, increased competitive grant funding, established an agency-wide fundraising structure, and built a comprehensive client tracking and outcomes evaluation process. In collaboration with a variety of academic institutions, advocacy groups and service agencies, Ms. Sieber has designed and led community-based research projects on a variety of topics related to domestic poverty. She is a graduate of the Massachusetts Institute of Technology.
MICHAEL SHEPSIS, ESQ.
Mr. Shepsis is Staff Attorney at CAPLAW, where he conducts research and advises community action agencies on a wide range of legal matters, including tax-exempt organization law requirements, nonprofit corporate governance, and employment law. Prior to joining CAPLAW, he practiced law at a foreclosure defense firm that represented indigent clients facing foreclosure. Mr. Shepsis also completed several years at a large regional CPA firm, where he audited the financial statements of private companies and nonprofit organizations, and prepared federal and state tax returns. Mr. Shepsis is a graduate of Boston University and Northeastern University School of Law.

KAY SOHL, PA
Ms. Sohl has provided training and consultation for CFOs, executive directors, and Boards of Directors of over 5,000 not-for-profit organizations throughout the United States. She has worked closely with CAPLAW and the Community Action Partnership to create a series of toolkits for Community Action Agencies including resources addressing cost allocation, budgeting, accounting, financial reporting, and internal controls, and to develop innovative financial leadership training strategies. Ms. Sohl currently focuses her work on strategies to increase the financial sustainability of Community Action Agencies and addresses increasing pressures on internal control and compliance issues. She is a frequent presenter for the AICPA national not-for-profit conferences, state CPA societies, and state networks of Community Action Agencies and affordable housing organizations.

MICHAEL TARPINIAN
Mr. Tarpinian currently serves as the Chief Executive Officer of The Opportunity Alliance, Community Action Program (CAP) agency for Cumberland County in Maine. The Opportunity Alliance partners with communities and individuals to deliver a full spectrum of social services and mental health care. During his tenure at The Opportunity Alliance, Mr. Tarpinian has overseen two mergers and has dramatically expanded the Agency’s roster of services for Maine’s most vulnerable individuals, families and communities.

JENNIFER TAUDB, PH.D.
Dr. Taub is a licensed Clinical Psychologist and the Director of Research and Evaluation at Project Hope in Roxbury, MA. Project Hope serves homeless families with programs including a family shelter, adult education, workforce development, and child care. With over 15 years of experience in human services program evaluation, Dr. Taub has worked as an evaluation consultant for child and youth serving mental health programs, diversity and educational programs, Healthy Start home visiting programs, child and adult wraparound services programs, and respite services for children with special health care needs. She has worked with government agencies, nonprofit child and youth programs, health care organizations, and schools. At Project Hope, Dr. Taub is responsible for oversight of data and reporting internally and externally, outcomes measurement for programs and services, and works closely with Development and programs to develop theories of change, evaluation plans, and trains staff in evaluation.

BRIAN TIPTON, ESQ.
Mr. Tipton is a Shareholder in the Montgomery, Alabama law firm of Sasser, Sefton, Brown, Tipton & Davis, P.C. 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. He is a summa cum laude graduate of the Louisiana State University and the Cumberland School of Law of Samford University.

DENES TOBIE, CPA
As a partner in Wipfli LLP’s nonprofit and government practice (NGP), Ms. Tobie oversees audit engagements and consulting opportunities and works with clients to maintain compliance with laws and regulations. She also oversees the NGP’s training practice. As a leader of this practice, Denes trains nonprofits and government agencies in regulations, best practices, and governance.
YASMINA VINCI, MA, MPA
Ms. Vinci is the Executive Director of the National Head Start Association (NHSA). She came to NHSA after several years as founder of EDGE Consulting Partners where she pursued a variety of projects in early education. Ms. Vinci founded EDGE after receiving her Master in Public Administration from Harvard’s Kennedy School of Government. Her experience is grounded in service as executive director of an early care and education program serving low-income families. In State government, she supervised Head Start research, administered the Dependent Care Grant, and planned for New Jersey’s implementation of the Child Care and Development Block Grant. Ms. Vinci also brings to her NHSA role over ten years of executive director experience at NACCRRRA, another national early childhood organization. She currently serves on the Governing Board of the Council for Professional Recognition, numerous advisory boards and is a member of the International Organizing Committee for the World Forum on Early Care and Education.

DITZAH WOODEN-WADE
Ms. Wooden-Wade is the Assistant Manager of Massachusetts Department of Housing and Community Development (DHCD), Community Services Programs where she oversees the Community Services Block Grant (CSBG), the Low-Income Home Energy Assistance Program (LIHEAP), and the State funded Individual Development Account (IDA) Program. Prior to joining joined DHCD in July 2007, she worked as the executive director for an economic development arm of a faith-based organization located in Brockton, MA. Ms. Wooden-Wade entered the non-profit community after 26 years in the financial services industry working in institutional and international banking. Since joining DHCD, she has served on several Governors’ task force groups, she is the Board Secretary for the National Association for State Community Services Programs (NASCSP) and is the Committee Chair of Member Services. She works closely with the Massachusetts Association for Community Action (MASSCAP) and the State Integrated Assessment Partnership with the Northeast Institute for Quality Community Action (NIQCA).
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