PORTLAND
MARRIOTT DOWNTOWN WATERFRONT
JUNE 10–12, 2015
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 2015 CAPLAW Conference in Portland.

PACIFIC NORTHWEST COMMUNITY ACTION ASSOCIATION
Lisa Stoddard, President
Jerralynn Ness, CAPLAW Board Member
Dear CAPLAW Conference Participants,

Welcome to the 2015 CAPLAW National Training Conference in Portland, Oregon! Thank you for taking time out of your busy schedule to join us and to expand your knowledge base and peer contacts. We hope you will also have time to explore some of the famous green spaces, local food and culture that Portland has to offer.

The Community Action network is facing a deluge of new rules from the Uniform Guidance to the Community Service Block Grant (CSBG) Organizational Standards to new Head Start regulations. Our workshops are designed to tackle these and other topics head on and to help the Community Action network succeed. Throughout the conference, our expert presenters will not only help you understand the impact of the various requirements on the Community Action network but will also offer practical tips and tools for compliance. We will address legal, governance, financial, CSBG, Head Start and Weatherization issues that present daily challenges for Community Action Agencies, including strategies to ensure the sustainability of CAAs. Our goal is to explore new ways to move forward in these constantly evolving and demanding times.

We are delighted to host Tim Gard, CSP, CPAE as our Opening Session Speaker. With his down-to-earth style and real-life humor, Tim will show us how to reduce stress and successfully overcome the challenges we face everyday by changing the game. During the Lunch with OCS and HHS on Thursday, Jeannie Chaffin, 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 (HHS) and Ann Linehan, Deputy Director of the Office of Head Start also within ACF at HHS will answer questions and share their thoughts on a variety of topics. Friday morning we are excited to welcome U.S. Senator Jeff Merkley and David Bradley, Executive Director of the National Community Action Foundation (NCAF), to share their insights from Washington D.C.

In addition, this year’s conference offers a variety of opportunities for you to grow one of your most valuable professional resources – your network of peer contacts! We encourage you to take advantage of all of this year’s peer connection activities, including: Wednesday evening’s Networking Reception, the Wall of Knowledge, Thursday afternoon’s Lunch with OCS and HHS, and Friday morning’s Breakfast Roundtables. Don’t miss meeting and learning from your peers! We hope you will leave Portland this year with fresh ideas and inspiration to implement sustainable changes in your organization.

Sincerely,

Winston Ross
President of CAPLAW
Eleanor Evans
Executive Director/General Counsel
Winston A. Ross, President
Former Executive Director, Westchester Community Opportunity Program
Elmsford, New York

David Brightbill, Vice President
Executive Director, Washington–Morgan Counties Community Action Program
Marietta, Ohio

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

Jerralynn Ness, Secretary
Executive Director, Community Action serving Washington County
Hillsboro, Oregon

Cynthia Burton, Board Member
Executive Director, Community Service Programs of West Alabama, Inc.
Tuscaloosa, Alabama

Hal Cohen, Board Member
Secretary, Vermont Agency of Human Services
Williston, Vermont

Kathy Di Nolfi, Board Member
Executive Director, A New Leaf - Mesa Community Action Network
Mesa, Arizona

Pamela La Frenz, Board Member
Executive Director, Missouri Valley Community Action Agency
Marshall, Missouri

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

Sandra Sewell, Board Member
Executive Director, AJFC Community Action Agency, Inc.
Natchez, Mississippi

Patricia Steiger, Board Member Emeritus
Management Consultant & Former Executive Director, National Community Action Management Academy
Bettendorf, Iowa

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

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

Eleanor Evans, Esq., Executive Director & General Counsel
Boston, Massachusetts

Allison Ma’luf, Esq.
Deputy Director & Senior Counsel

Christopher Logue, Esq.
Staff Attorney

Veronica Zhang, Esq.
Staff Attorney

Ashley Billingsley
Administrative Coordinator/Executive Assistant

Stephanie Knechtle
Communications Coordinator
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Region VIII Community Action Partnership celebrates the efforts of CAPLAW to assist and train Community Action Agencies and staff throughout the country to serve low income people in accordance to the legal requirements governing the wide variety of CAA funds.

CAPLAW helps to insure that the CAA network is increasingly aware of the up to date rules, regulations and legal procedures required to spend tax dollars in a prudent and effective manner.

**SOUTHERN NEW HAMPSHIRE SERVICES**

Extends Best Wishes to CAPLAW for a Successful Conference!

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Community Action Program Legal Services, Inc.
NATIONAL TRAINING SERVICE CONFERENCE!

ABCD is proud to partner with CAPLAW as we pursue our joint mission to empower individuals, families, and communities overcome poverty and lead lives of success and dignity. Since 1989 CAPLAW has worked tirelessly to sustain community action programs across the country with high quality legal services and counsel, educational resources, and governance support. CAPLAW provides critical organizational structure for community action programs nationwide and enhances the services offered to low-income seniors, children, and working families. ABCD commends CAPLAW’s exceptional work and extends our best wishes for continued success.
### TUESDAY, JUNE 9, 2015

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<tr>
<th>Time</th>
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<tr>
<td>3 pm - 5 pm</td>
<td>Registration &amp; Information</td>
<td>Lower Lobby</td>
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### WEDNESDAY, JUNE 10, 2015

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<td>8 am - 5:30 pm</td>
<td>Registration &amp; Information</td>
<td>Ballroom Lobby</td>
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<tr>
<td>8 am - 12:15 pm</td>
<td>Pre-Conference Tour <em>(Registration is required. Tour will leave from the lobby.)</em></td>
<td>Ballroom Lobby</td>
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<tr>
<td>9:00 am - 10:15 am</td>
<td>Pre-Conference Workshops <em>(15-minute break included)</em></td>
<td>Ballroom Lobby</td>
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<td>A. Governance: Cultivating Effective Oversight Practices: Governance Case Studies</td>
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<td>C. Financial: Ready, Set, Go: Developing Strategies for Uniform Guidance Compliance</td>
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<td>D. Sustainability: Essential Ingredients for a Successful Fundraising Plan</td>
<td>Salon I</td>
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<tr>
<td>10:15 am - 10:30 am</td>
<td>Morning Break with Exhibitors</td>
<td>Ballroom Lobby</td>
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<tr>
<td>10:30 am - 11:30 am</td>
<td>Pre-Conference Workshops <em>(continued)</em></td>
<td>Ballroom Lobby</td>
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<tr>
<td>1 pm - 2:30 pm</td>
<td>Opening Session</td>
<td>Salon EF</td>
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<td>2:30 pm - 3 pm</td>
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<td>3 pm - 4:45 pm</td>
<td>Workshop Session One</td>
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<td>1A. Governance: Navigating Executive Transitions</td>
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<td>1B. HR: Cutting Edge Issues in Employment Law</td>
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<td>1C. Financial: Identifying &amp; Managing Unrelated Business Income</td>
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<td>1D. Sustainability: Tips for Tapping into the Pool of Private Foundation Funding</td>
<td>Salon GH</td>
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<td>1E. Program: Access to Immigration Relief &amp; Services - An Update on the President’s Policies</td>
<td>Eugene</td>
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<td>1F. Program: Making the Match: Head Start In-Kind</td>
<td>Columbia</td>
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<tr>
<td>5 pm - 5:30 pm</td>
<td>Elective Session with Mutual of America</td>
<td>Eugene</td>
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<tr>
<td>5:30 pm - 7 pm</td>
<td>Networking Reception</td>
<td>Mt. Hood, 2nd Floor</td>
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### THURSDAY, JUNE 11, 2015

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<td>8 am - 9 am</td>
<td>Continental Breakfast</td>
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<td>9:30 am - 10:30 am</td>
<td>Workshop Session Two</td>
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<td>2A. Governance: Clarifying Board &amp; Staff Roles - The Invisible Yellow Line</td>
<td>Salon I</td>
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<td>2B. HR: Techniques for Promoting a Productive &amp; Accountable Workplace</td>
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<td>2C. Financial: Overview of Indirect Costs Under the Uniform Guidance</td>
<td>Salon CD</td>
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<td>2D. Sustainability: It’s Time for a (Real) Theory of Change</td>
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<td>2E. Program: Head Start Update</td>
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<td>2F. Program: The Future of Community Action</td>
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### THURSDAY, JUNE 11, 2015 (CONTINUED)

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<tr>
<td>10:30 am -</td>
<td><strong>Morning Break with Exhibitors</strong></td>
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<td>10:45 am -</td>
<td><strong>Workshop Session Two (continued)</strong></td>
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<td>12 pm - 1:40 pm</td>
<td><strong>Greetings from National Partners and Lunch with OCS and HHS</strong></td>
<td>Salon EF</td>
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<td>2 pm - 3:30 pm</td>
<td><strong>Workshop Session Three</strong></td>
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<td>3A. <strong>Governance</strong>: Nuts &amp; Bolts of Tripartite Boards</td>
<td>Salon I</td>
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<td>3B. <strong>HR</strong>: Employee Handbook Tips &amp; Traps</td>
<td>Salon AB</td>
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<td>3C. <strong>Financial</strong>: Form 990 Update &amp; Other 501(c)(3) Hot Topics</td>
<td>Salon CD</td>
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<td>3D. <strong>Sustainability</strong>: 45+ Great Ideas to Raise More Money in a Mail Campaign</td>
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<td>3E. <strong>Program</strong>: The Changing Landscape of Weatherization</td>
<td>Eugene</td>
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<td>3F. <strong>Program</strong>: Management &amp; Oversight of Subgrants</td>
<td>Columbia</td>
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<tr>
<td>3:30 pm - 4 pm</td>
<td><strong>Afternoon Break with Exhibitors</strong></td>
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<td>4 pm - 5:30 pm</td>
<td><strong>Workshop Session Four</strong></td>
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<td>4A. <strong>Governance</strong>: Fine Tuning the Mechanics of Board Operations</td>
<td>Salon I</td>
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<td>4B. <strong>HR</strong>: Before the Welcome Letter: Hiring Legal Lessons</td>
<td>Salon AB</td>
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<td>4C. <strong>Financial</strong>: Are You Ready for the Bear Claw? Procurement Under the Uniform Guidance</td>
<td>Salon CD</td>
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<td>4D. <strong>Sustainability</strong>: Social Enterprise - Weatherization Fee-for-Service</td>
<td>Columbia</td>
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<td>4E. <strong>Program</strong>: Mastering the Head Start Aligned Monitoring Process</td>
<td>Eugene</td>
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<td>4F. <strong>Program</strong>: Improving Performance Management: ROMA Next Generation &amp; the Revised Annual Report</td>
<td>Salon GH</td>
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### FRIDAY, JUNE 12, 2015

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<tr>
<th>Time</th>
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<tr>
<td>7:30 am - 12 pm</td>
<td><strong>Conference Information</strong></td>
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<td>7:30 am - 8:45 am</td>
<td><strong>Continental Breakfast &amp; Roundtables</strong></td>
<td>Salon EF</td>
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<tr>
<td>7:30 am - 8:45 am</td>
<td><strong>Attorney Network Breakfast</strong></td>
<td>Eugene</td>
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<td>8:45 am - 9 am</td>
<td><strong>Morning Break with Exhibitors</strong></td>
<td>Ballroom Lobby</td>
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<tr>
<td>9 am - 10:45 am</td>
<td><strong>Workshop Session Five</strong></td>
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<td>5A. <strong>Governance</strong>: Effective Leadership Dialogue</td>
<td>Salon I</td>
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<td>5B. <strong>HR</strong>: Affordable Care Act Review: What’s New?</td>
<td>Salon AB</td>
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<td>5C. <strong>Financial</strong>: From the Auditor’s Desk - Understanding the Impact of the Uniform Guidance</td>
<td>Salon CD</td>
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<td>5D. <strong>Sustainability</strong>: Effective Special Events: It’s Not About the Napkin Colors</td>
<td>Salon GH</td>
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<td>5E. <strong>Program</strong>: Toot Your Horns! Raise Your Voices! - Advocacy that Works!</td>
<td>Columbia</td>
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<td>11 am - 12 pm</td>
<td><strong>Legislative Insights with David Bradley, NCAF and U.S. Senator Jeff Merkley</strong></td>
<td>Salon EF</td>
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Ohio Association of Community Action Agencies

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The Connecticut Association for Community Action, Inc. (CAFCA) is proud to support and wish CAPLAW all the best for a successful and exciting 2015 conference!

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Empowering people in need and improving the communities in which they live.

Edith Pollock Karsky, Executive Director
Rhonda Evans, Deputy Director
Kelley Hall, Communications, Development, and Grants Manager
Dr. James Gatling, CAFCA Board Chair

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www.twitter.com/CAFCA_INC

Best wishes, CAPLAW, for an enlightening & successful conference!

Anita S. Lichtblau
Partner, Casner & Edwards, LLP
Nonprofit Organization Law Practice Group

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### TUESDAY, JUNE 9, 2015

<table>
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<td>8 am - 12:15 pm</td>
<td><strong>Pre-Conference Tour</strong></td>
<td>Ballroom Lobby</td>
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<tr>
<td>9 am - 10:15 am</td>
<td><strong>Pre-Conference Workshops</strong> (15-minute break included)</td>
<td>Salon AB</td>
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#### A. Governance: Cultivating Effective Oversight Practices: Governance Case Studies

How does a board function in a manner that goes beyond just complying with formalities and endless checklists to adding real value to the organization’s mission and operations? In this interactive session, we will home in on the ways in which boards develop and implement governance practices that result in exemplary organizations. Participants will be divided into small discussion groups to analyze case scenarios based on real CAA situations. Each group will arrive at a solution for each scenario and share it with the session as a whole. Workshop leaders will summarize the solutions and offer suggested practices arising out of their group discussions. The session will also include lessons learned from actual situations where the board may not have carried out their essential functions. This is an opportunity to expand your governance knowledge, express your opinions, work with CAA leaders from around the country, and learn from the experiences of others.

**Presenters:** Anita Lichtblau, Esq., Casner & Edwards, LLP  
Patricia A. Steiger, CCAP  

**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** Knowledge of CSBG tripartite board requirements and Head Start board responsibilities

**Level:** Intermediate

**After participating in this workshop you will be able to:**
- Understand how board and governance practices can impact financial accountability of CAA  
- Identify practices and policies the board may implement to improve oversight of the CAA  
- Develop strategies for achieving the best balance in the board’s relationship with the Executive Director between strong oversight, appropriate delegation of management duties, and effective sounding board
B. **HR: Game’s On! Coordinating the Interplay Among Different Leave Laws**

Known as the Bermuda triangle of employment leave laws, the overlap of the Family Medical Leave Act (FMLA), the Americans with Disabilities Act (ADA) and state worker’s compensation laws can be very tricky for employers. Granting leave under these laws also often raises questions of employer compliance with federal and state wage and hour requirements. This interactive session will use an engaging case study approach to clarify the distinctions among the different employment laws triggered by an employee’s request for leave and explore ways an employer can successfully navigate the interplay between them. We will discuss the procedures and processes employers should have in place to maintain compliance with the different laws and the proactive steps an employer may take to hopefully avoid liability arising from non-compliance.

**Presenter:** Rick Pins, Esq., Stinson Leonard Street, LLP  
**CPE Field of Study:** Personnel/HR  
**Advance Preparation:** None  
**Prerequisites:** Knowledge of the basic employer obligations under the Americans with Disabilities Act, Family Medical Leave Act, Worker’s Compensation laws and Fair Labor Standards Act  
**Level:** Intermediate  

**After participating in this workshop you will be able to:**
- Understand the interplay between the different laws triggered by an employee’s request for leave  
- Respond more effectively to an employee’s request for leave  
- Review current procedures and policies to determine if they need to be revised to better reflect the requirements under the different laws

C. **Financial: Ready, Set, Go: Developing Strategies for Uniform Guidance Compliance**

This session offers a project management approach to Uniform Guidance (Super Circular) compliance that will help not only those organizations preparing to comply with the new requirements but also those who have begun to comply. We will explore strategies to identify changes required at all levels - from budget and accounting systems, to fiscal policies and procedures, payroll, procurement and more. Beyond revising systems and policies, we will discuss practical strategies to train and support staff to facilitate a smooth transition and ongoing compliance.

**Presenter:** Kay Sohl, PA, Kay Sohl Consulting  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** Working knowledge of OMB Circulars  
**Level:** Intermediate  

**After participating in this workshop you will be able to:**
- Identify changes to organizational systems, policies and procedures that may be required for Uniform Guidance compliance  
- Explain to management different strategies for training and supporting staff to help facilitate a smooth transition
### D. Sustainability: Essential Ingredients for a Successful Fundraising Plan

Whether you will conduct your first-ever fundraiser next year or have been engaged in private philanthropy for years, the key to success is a clear, well-formulated plan that is built from sound fundraising principles. Some questions you have probably been asking may include – How do you build a list to get started; how much should you rely on special events as part of your overall strategy; when should you go back and ask that recent donor for another gift; how do you know which current or potential donors should be getting more of your attention; how do you craft a solid case for private gifts when our work is so heavily government funded? And, of course, in our highly regulated world, where do you find the resources to get started? Join Catherine Crooker and Jeri Alcock, two seasoned development professionals who have led successful Community Action fundraising programs, to learn more about the essential pieces for building your next development plan.

**Presenters:** Jeri Alcock, CFRE, Donor Search  
Catherine Crooker, Community Action, Inc., Hillsboro, OR

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Explore the best way to fund the start-up or expansion of your private fundraising program
- Assess how each component of your current or proposed fundraising program plays a role in your overall fundraising success
- Determine how to identify potential donors who are the best match for your organization

### Conference Schedule

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<th>Time</th>
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1A. **Governance: Navigating Executive Transitions**

Because the health and strength of an organization is often dictated by who is at the helm, navigating a smooth transition between leaders can be challenging for organizations, especially those unprepared for the change. In this session, we will discuss the practical and legal requirements for both planned and unplanned executive transitions as well as steps necessary for board management of the transition. Topics we will explore include the board's role in strategic planning in preparation for an executive transition; severance arrangements and exit procedures for departing executives; the search and hiring process for new leaders; compensation of the new executive director; interim leadership options; communications with funding sources and the community concerning the transition; and on-boarding of new executive directors.

**Presenters:** Anita Lichtblau, Esq., Casner & Edwards, LLP  
Patricia A. Steiger, CCAP

**CPE Field of Study:** Business Management & Organization  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

**After participating in this workshop you will be able to:**

- Recognize legal issues that may arise as part of an executive leadership transition  
- Educate board and staff members on the roles each play in ensuring a smooth executive transition  
- Develop or revise strategies for current and impending executive leadership transitions
1B. HR: Cutting Edge Issues in Employment Law

Staying abreast of ever-changing employment laws and guidance is essential for operating and managing a successful work place. Join us for a discussion of what’s new and upcoming in the employment laws most relevant to CAAs. In this session, we will explore recent litigation trends, the impact of new National Labor Relation board decisions on all employers, recent interpretations of the Americans with Disabilities Act (ADA), guidance from the Equal Employment Opportunity Commission (EEOC) on pregnancy discrimination matters, President Obama’s executive actions on employee immigration issues and more!

Presenter: Rick Pins, Esq., Stinson Leonard Street, LLP
CPE Field of Study: Personnel/HR
Advance Preparation: None
Prerequisites: Familiarity with basic employer obligations under the National Labor Relations Act, the Americans with Disabilities Act, and various other anti-discrimination laws such as Title VII of the Civil Rights Act of 1964 and the Pregnancy Discrimination Act.

Level: Update
After participating in this workshop you will be able to:
– Explain to key staff the importance of new employment laws and guidance
– Identify policies and procedures impacted by new employment laws and guidance
– Develop a strategy for ensuring compliance with new employment laws and guidance

1C. Financial: Identifying and Managing Unrelated Business Income

Thinking creatively about ways to generate income is only one step in the direction to sustainability. Tax-exempt CAAs must also understand the legal parameters for activities that go beyond the organization’s charitable purposes. In this session, we will discuss the history and elements of unrelated business income rules. Using a variety of examples, we will examine what constitutes a “trade or business, regularly carried on, not substantially related to the exempt purpose” and explore ways that earned income may be generated without jeopardizing your organization’s tax-exempt status. We will also cover numerous exceptions and exclusions including rental income, advertising/sponsorships, volunteer labor and donated merchandise.

Presenters: Ann Swindell, CPA, CliftonLarsonAllen LLP
           David Trimner, CPA, CliftonLarsonAllen LLP
CPE Field of Study: Taxes
Advance Preparation: None
Prerequisites: Familiarity with the basic requirements relating to unrelated business income
Level: Intermediate
After participating in this workshop you will be able to:
– Educate board and staff members on what organizational activities may generate unrelated business income
– Develop strategies for managing unrelated business income
1D. **Sustainability: Tips for Tapping into the Pool of Private Foundation Funding**

This interactive panel discussion will explore the similarities and differences between writing grants to government agencies and writing grants to private foundations, including corporate, charitable and family foundations. Learn the key strategies needed to successfully tap into the pool of private foundation funding, such as how to identify the best match, how to cultivate the relationship, and what kinds of information private foundations are looking for. Our panel will include a program officer from a major private charitable foundation, a professional grant writer and a foundation trustee.

**Presenters:** See Program Insert  
**Moderator:** Catherine Crooker, Community Action, Hillsboro, OR  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

**After participating in this workshop you will be able to:**
- Understand the key differences between seeking government grants and seeking private grants
- Translate your organization’s government grant writing skills to writing grants for private foundation funds
- Identify private foundations that are a match for your organization’s needs

1E. **Program: Access to Immigration Relief and Services - An Update on the President’s Policies**

Join this session for an update on President Obama’s immigration relief and enforcement announcements. We will explore the impact of the recent immigration actions on the low-income individuals and families served by the Community Action Network. We will discuss efforts to promote the President’s policies as well as attempts to challenge their implementation. We will review access to employment and related services for CAA clients who are granted deferred action. And, if time permits, we will highlight state policies affecting access to services for these and other immigrants.

**Presenter:** Tanya Broder, Esq., National Immigration Law Center  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

**After participating in this workshop you will be able to:**
- Understand the impact that current immigration policies and enforcement actions have on your organization’s immigrant clients
- Provide more effective services to immigrant clients
**Program:** Making the Match: Head Start In-Kind

Are you finding in-kind harder to generate? Is answering the question, "Is this in-kind?," your responsibility? Does generating in-kind fall on your shoulders? If you answered yes to any of these questions, join us for a discussion of the tools, techniques and regulations of generating, calculating and documenting in-kind. Make generating in-kind the responsibility of everyone in your program. We will focus on what regulations and guidelines govern nonfederal in-kind; how to decide whether a contribution is allowable nonfederal in-kind; where the most amount of nonfederal match is missed; and documenting all in-kind.

**Presenter:** Denes Tobie, CPA, Wipfli LLP  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** Working knowledge of the Head Start requirements relating to match/in-kind  
**Level:** Intermediate

**After participating in this workshop you will be able to:**  
- Understand your organization's obligation with respect to Head Start in-kind  
- Discuss the different types of in-kind, with tips on how to generate more in-kind  
- Review the specifics of in-kind policy clarifications and recognize the common in-kind pitfalls to avoid

5 pm - 5:30 pm **Elective Session with Mutual of America**  
5:30 pm - 7 pm **Networking Reception**
### Conference Schedule

**Thursday, June 11, 2015**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 am - 5:30 pm</td>
<td><strong>Registration and Information</strong></td>
<td>Ballroom Lobby</td>
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<tr>
<td>8 am - 9 am</td>
<td><strong>Continental Breakfast</strong></td>
<td>Ballroom Lobby</td>
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<tr>
<td>9:30 am - 10:30 am</td>
<td><strong>Workshop Session Two</strong></td>
<td>Salon I</td>
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#### 2A. Governance: Clarifying Board and Staff Roles - The Invisible Yellow Line

Wouldn’t it be easy if the roles of board and staff were clearly defined at all times? Unfortunately, this is not the case. This practical workshop will use football – yes, football – to clarify the primary roles of board and staff in governance, finances, human resources, planning, and fundraising. Even if you’re not a football fan, you’ll appreciate the ideas and advice this session will offer about ways to get everyone on the same team, focused on your CAA’s mission. The session is based on the popular book *The Invisible Yellow Line*, written by the presenter. You will take away concise, practical ways to clarify who does what in your CAA and how staff and board volunteers can successfully work together as a team.

**Presenter:** Jean Block, Jean Block Consulting, Inc.

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Recognize areas where roles of board and staff tend to overlap and cause problems
- Learn some questions to ask in order to clarify roles and responsibilities in your organization
- Develop a working plan to address some of the “muddy assumptions” that may prevent clear definition of staff and board roles

#### 2B. HR: Techniques for Promoting a Productive and Accountable Workplace

Join us to learn techniques for successfully motivating, evaluating and disciplining employees. Using real-life workplace scenarios, we will examine how to manage expectations and performance through effective and constructive employer-employee communications. We will focus on reviewing and revising job descriptions, addressing employee complaints, implementing constructive evaluations that lead to improved operations and deploying disciplinary measures that maintain legal compliance while promoting a productive workplace.

**Presenter:** Mark Jacobs, Esq., Fisher & Phillips, LLP

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Identify policies and procedures to revise in an effort to enhance the employer/employee relationship
- Provide supervisors with strategies for improving employee performance
2C. **Financial:** Overview of Indirect Costs Under the Uniform Guidance

In this session, we will explore the practical impact of the Uniform Guidance (Super Circular) on the treatment of indirect costs. We will not only discuss what’s new under the Uniform Guidance, but we will also help CAAs analyze whether the ways in which they comply with the unchanged requirements, as well as, new aspects of the Guidance are sound and effective. Using scenarios and examples, we will examine how administrative costs may be charged, the 10% de minimis rate, indirect cost rate choices, and the option to extend current rates.

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

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

**Advance Preparation:** None

**Prerequisites:** Knowledge of treatment of indirect costs under the OMB Circulars

**Level:** Intermediate

**After participating in this workshop you will be able to:**
- Identify changes to the way the organization treats indirect costs that may be required for Uniform Guidance compliance
- Explore the different ways in which the organization may treat indirect costs
- Explain to key staff and the board the reasoning behind the organization's treatment of indirect costs

2D. **Sustainability:** It’s Time for a (Real) Theory of Change

Attend this session to explore how a theory of change can both inform strategy and facilitate its translation into daily work. We will specifically address the complexity and breadth of Community Action services. You will learn how to use provided tools to create a theory of change for your organization, build employee and client engagement, and gain consensus among community collaborators. We will provide participants with an example of a “universal” theory of change that an organization can adopt or modify for its use, saving scores of hours. Through examples from the Community Action network, we will discuss how a CAA can transform its organization and strengthen relationships with funders and board members by using theory of change tools.

**Presenters:** Tim Johnstone, Hopelink, Redmond, WA

Merritt Mount, Washington State Community Action Partnership, Olympia, WA

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Create and use a theory of change for your organization
- Use your theory of change to increase both employee and client engagement
- Better communicate what you do and demonstrate your organization's effectiveness to board members and funders
- Create stronger and more efficient community collaborations
2E. **Program:** Head Start Update

Join us for a lively panel discussion about Head Start and Early Head Start hot topics. In this session, we will address a wide range of topics, including: Early Head Start-Child Care Partnership grants, the five year grant process, the current status of the designation renewal system, Head Start’s implementation of the Uniform Guidance, the final Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA) regulations, the status of the notice of proposed rulemaking for the revised program performance standards and the state of the reauthorization of the Head Start Act. During this session, we will discuss the practical implications of all of these initiatives and compliance measures for the Community Action network’s Head Start programs.

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

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

**Advance Preparation:** None

**Prerequisites:** Familiarity with Head Start designation renewal system, Uniform Guidance, Head Start Performance Standards and Head Start Act

**Level:** Update

**After participating in this workshop you will be able to:**

- Educate staff, board and Policy Council members on the current status of key Head Start policy initiatives and compliance measures
- Identify policies and procedures that may need to be reviewed and revised pursuant to these initiatives and compliance measures
2F. **Program: The Future of Community Action**

The world of Community Action is undergoing major changes that impact the entire network. The issuance of both Information Memorandum (IM) 138 and the proposed state and federal accountability measures are shaping the future of Community Action through the establishment of CSBG Organizational Standards and the creation of measures intended to ensure that both state and federal CSBG administrators are accountable to high standards of performance management. This session will address the core elements of IM 138 including the role of Community Action and State CSBG Offices in implementation, assessment, and improvement strategies. We will also discuss how the state and federal accountability measures will affect CAAs and impact the facilitation and management of CSBG funds. Tools, resources, and time for Q/A will be provided.

**Presenters:** Jenae Bjelland, National Association for State Community Services Programs

Jeannie Chaffin, Federal Office of Community Services

Denise Harlow, MSW, CCAP, Community Action Partnership

**Moderator:** Eleanor Evans, Esq., CAPLAW

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

**Advance Preparation:** None

**Prerequisites:** Familiarity with CSBG Organizational Standards and state and federal accountability measures

**Level:** Update

**After participating in this workshop you will be able to:**

- Explain the purpose and role of the CSBG Organizational Standards and state and federal accountability measures in the current policy environment
- Understand how to assess your CAA with respect to the CSBG Organizational Standards and identify tools to help your CAA meet the standards
- Explain to the board and staff the purpose of the state and federal accountability measures and assess the impact the measures will have on individual CAAs
Workshop Session Three

3A. **Governance: Nuts and Bolts of Tripartite Boards**

The foundation of a healthy, strong CAA is rooted in its understanding of what it means to be a tripartite board. In this session, we will explore how board members of both public (governmental) and nonprofit grantees fulfill the Community Services Block Grant (CSBG) mandate to “fully participate in the development, planning, implementation, and evaluation of the [CSBG] program.” We will also address composition and selection requirements for each of the three board sectors (public, low-income and private) and discover effective ways to recruit and develop board members. Throughout the session we will highlight different tools and resources focused on helping CAA boards strengthen their understanding of tripartite board governance.

**Presenters:** Christopher Logue, Esq., CAPLAW
Veronica Zhang, Esq., CAPLAW

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Educate board and staff members on ways to comply with the CSBG mandate that the tripartite board fully participate in the development, planning, implementation and evaluation of the CSBG program
- Identify ways in which your CAA’s board may improve its tripartite board selection policies and procedures
- Offer your CAA’s board resources that it may use to better understand tripartite board responsibilities and composition requirements

3B. **HR: Employee Handbook Tips and Traps**

Maintaining a well-written and up-to-date employee handbook is more important than ever, especially since the CSBG Organizational Standards specify that personnel policies should be reviewed by an attorney and approved by the board at least every five years. In this session, we will explore the role employee handbooks play in establishing employer expectations and the operational framework for an organization. We will discuss the type of review that an employer undergoes to minimize well-intended but poorly written policies that may create legal risks and inadvertent obligations for employers. We will address outdated policies related to leaves, hiring tests, credit checks, harassment and discrimination, criminal background information, and medical tests that may have been appropriate when written but are now being challenged in court and by various government agencies.

**Presenter:** Tillman Coffey, Esq., Fisher & Phillips LLP

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Identify what should and should not be included in an employee handbook
- Explain the benefits of a customized approach to developing and updating an employee handbook
- Recognize ways to use your organization’s handbook as a management tool
3C. **Financial: Form 990 Update and Other 501(c)(3) Hot Topics**

The Form 990 is one of the most important documents a nonprofit CAA files – it serves as the public’s one guaranteed window into the inner workings of the organization. In this session, we will cover not only recent revisions to the Form 990 but also some of the trickier reporting obligations including executive compensation, fundraising revenue, unrelated business income and more. We will also discuss recent IRS enforcement activities and current issues of particular significance to 501(c)(3) organizations.

**Presenter:** Yee Lee McGee, CPA, Gary McGee & Co. LLP  
**CPE Field of Study:** Taxes  
**Advance Preparation:** None  
**Prerequisites:** Familiarity with Form 990 reporting obligations  
**Level:** Update  
**After participating in this workshop you will be able to:**  
- Determine what, if any, changes to implement in your Form 990 reporting and recordkeeping  
- Explain recent IRS enforcement activities and their significance to your organization

3D. **Sustainability: 45+ Great Ideas to Raise More Money in a Mail Campaign**

This fast paced workshop will share more than 45 practical, tried-and-true great ideas to enhance your annual mail campaign, from getting started on building a database, to easy ideas to get the envelope opened, to writing a dy-no-mite appeal letter. All these elements are critical to raising more money to support and sustain your important programs. Taught by a nonprofit pro with more than 45 years of experience, who will share ideas from her book *FUNdraising! 180+ Great Ideas to Raise More Money!* Whether you are starting out with a donor campaign or have been at it awhile, you’ll take away lots of good ideas.

**Presenter:** Jean Block, Jean Block Consulting, Inc.  
**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview  
**After participating in this workshop you will be able to:**  
- Develop a strategy for either creating or improving an annual mail campaign  
- Identify techniques for motivating donors to give regularly to your organization via a mail campaign  
- Grow your donor database for annual mail campaigns and other fundraising activities
Conference Schedule

Thursday, June 11, 2015

3E. **Program:** The Changing Landscape of Weatherization

The last six years have arguably been the most turbulent in the history of the Weatherization Assistance Program. During both the Recovery Act period, with unprecedented WAP funding, and its aftermath, with historic low funding levels, the program has continued to make sweeping programmatic changes. Panelists will provide perspective on recent program legislative issues, current status on WAP funding and the critical role of local advocacy, and updates on WAP policy and program direction, including the DOE Quality Work and Quality Management Plans.

**Presenters:** Katrina Metzler, National Association for State Community Services Programs

Dave Rinebolt, Esq., Ohio Partners for Affordable Energy

Ken Robinette, South Central Community Action Partnership, Inc.,

Twin Falls, ID

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

**Advance Preparation:** None

**Prerequisites:** Familiarity with current Weatherization Assistance Program requirements relating to program operations and accountability

**Level:** Update

After participating in this workshop you will be able to:

- Educate staff and board members on the current state of the weatherization program and how it impacts your organization’s weatherization efforts
- Develop strategies for compliance with current and impending Weatherization Assistance Program requirements and guidance

3F. **Program:** Management and Oversight of Subgrants

The Uniform Guidance has made significant changes to the requirements that apply to federal grantees issuing subgrants. CAAs with subrecipients under their various federal programs are treated as pass-through entities by the Uniform Guidance and must comply with heightened standards. In this session, we will explore the enhanced requirements including: the difference between subrecipients and contractors (vendors); pre-award risk assessments; subgrant agreements; indirect cost rate requirements; and effective monitoring techniques.

**Presenters:** Eleanor Evans, Esq., CAPLAW

Janet Johnson, CPA, CMA, Wipfli LLP

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

**Advance Preparation:** None

**Prerequisites:** Familiarity with treatment of subrecipients/subgrants under the OMB Circulars

**Level:** Intermediate

After participating in this workshop you will be able to:

- Distinguish between subrecipients and contractors (vendors)
- Identify elements to include in subgrant agreements
- Recognize the factors that pass-through agencies must consider in pre-award risk reviews
- Implement changes to your organization’s subgrantee monitoring process

3:30 pm - 4 pm **Afternoon Break with Exhibitors**
**Workshop Session Four**

**4A. Governance: Fine Tuning the Mechanics of Board Operations**

A well-functioning board of directors is in the best position to oversee and direct the affairs of the organization. Attend this session to explore practical approaches for optimizing the mechanics of your board’s operations. Through scenarios and group discussions, we will address topics such as settings for meetings, i.e., in person, by teleconference or computer; developing meeting agendas; customizing meeting procedures and decorum; decision-making by voting or consent; recording and maintaining meeting minutes; delineating the role of officers; establishing board committees; obtaining directors and officers insurance and determining which governance documents are useful and necessary.

**Presenter:** Cindy Cumfer, Esq.

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Identify areas for potential improvement in your board’s operations
- Working with your organization’s board and staff, take steps to improve board operations

**4B. HR: Before the Welcome Letter: Hiring Legal Lessons**

When filling empty offices, employers must be prepared for the possible legal effects of their hiring actions. In this session, we will explore ways to structure a hiring and screening process to help avoid the hidden obstacles and unexpected risks often associated with hiring new employees. We will discuss the legal implications associated with using social media, job applications, interview questions, and medical examinations or other testing if needed. This session will also address how employers ensure that background checks are proper in scope, based on valid reasons, and used in a legally compliant way.

**Presenter:** Tillman Coffey, Esq., Fisher & Phillips LLP

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

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Evaluate your organization’s hiring policies and practices and identify ways to improve them
- Educate staff on proper and compliant hiring policies and practices
4C. **Financial**: Are You Ready for the Bear Claw? Procurement Under the Uniform Guidance

Procurement rules are changing for grant-funded organizations and you will need to update your policies and procedures to meet the requirements in the Uniform Guidance (Super Circular). Even though organizations may elect to postpone application of the new procurement requirements for one year, staying ahead of the curve and proactively understanding and preparing for compliance is the key to a smooth transition. This session will address what is staying the same and what is changing. We will explore the five allowable procurement methods that make up the procurement bear claw; new requirements for price and cost comparisons; what is encouraged vs. what is required in the Uniform Guidance; and when a grantee has to comply with the standards. We will also provide examples of practical and efficient procurement procedures, and encourage discussion about your implementation plans.

**Presenter:** Janet Johnson, CPA, CMA, Wipfli LLP  
**CPE Field of Study:** Business Management & Organization  
**Advance Preparation:** Review Uniform Guidance provisions establishing procurement standards, 2 C.F.R. §§ 200.317 - 200.326  
**Prerequisites:** Familiarity with procurement standards under the OMB Circulars  
**Level:** Intermediate

**After participating in this workshop you will be able to:**
- Comprehend the differences in the current procurement requirements and those contained in the Uniform Guidance  
- Develop strategies for transitioning to the new procurement requirements

4D. **Sustainability**: Social Enterprise - Weatherization Fee-for-Service

With reduced and uncertain levels of federal funding for the Weatherization Assistance Program (WAP), many organizations receiving WAP funding are finding it necessary to leverage additional funding. These organizations and their trained workforce are in a unique position to be able to market their skills to non-WAP eligible households as a fee-for-service enterprise in their communities. Presenters will discuss the issues of setting up a “for profit” energy services arm, developing a business plan, and legal considerations, and then share success stories and lessons learned in establishing a weatherization fee-for-service enterprise.

**Presenters:** Allison Ma’luf, Esq., CAPLAW  
Katrina Metzler, National Association for State Community Services Programs  
Dave Rinebolt, Esq., Ohio Partners for Affordable Energy  
Ken Robinette, South Central Community Action Partnership, Inc., Twin Falls, Idaho

**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

**After participating in this workshop you will be able to:**
- Explore with board and staff the possibility of your organization developing a weatherization fee-for-service program  
- Identify areas of improvement if your organization is currently operating a weatherization fee-for-service program
### 4E. Program: Mastering the Head Start Aligned Monitoring Process

Thinking and acting proactively is critical for an organization’s Head Start program not only to survive but thrive. In this session, we will explore actions grantees may take to strengthen their Head Start programs and avoid recompetition. We will discuss guidance for five-year project grants and identify common problems that have placed grantees on the recompetition list. We will also explore proactive steps an organization can take to avoid those problems as it prepares for its next round of monitoring.

**Presenters:** R. Brian Tipton, Esq., The Private Client Law Group  
Yasmina Vinci, National Head Start Association  

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

**Advance Preparation:** None  

**Prerequisites:** Familiarity with Head Start monitoring process and requirements  

**Level:** Intermediate

**After participating in this workshop you will be able to:**
- Understand how the Head Start monitoring system has changed and the impact it will have on the grantee  
- Better prepare for monitoring the organization’s Head Start program(s) under the newly aligned monitoring system

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### 4F. Program: Improving Performance Management: ROMA Next Generation and the Revised Annual Report

Hear about the latest developments in CAA performance management and measurement. This session will provide an overview of updates to the Results Oriented Management and Accountability (ROMA) National Performance Indicators (NPI) and will help you better understand ROMA Next Generation’s focus on data analysis and evaluation. We will deal with subjects such as linking outcomes to key client and service characteristics, using data for decision-making and to identify trends, utilizing scales and matrices to track progress, and utilizing input from experts, other programs, and funding sources. We will also review tips and tools for analysis that will assist you in evaluating the data your CAA has gathered about its performance in order to enhance and improve that performance.

**Presenters:** Jenae Bjelland, National Association for State Community Services Programs  
Barbara Mooney, Ed.D., National Association for State Community Services Programs, ROMA Next Generation Center of Excellence

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

**Advance Preparation:** None

**Prerequisites:** Familiarity with current CSBG reporting and performance management requirements such as ROMA and the Annual Report

**Level:** Update

**After participating in this workshop you will be able to:**
- Identify useful tools to assist your CAA in analyzing its performance data  
- Use your agency’s data to assess if your programs meet community needs  
- Understand some ways to use data to enable changes in programs which affect outcomes
5A. **Governance: Effective Leadership Dialogue**

Being an effective and successful leader is not necessarily a gift bestowed upon a chosen few but a skill that is developed, honed and constantly strengthened. Join this session to learn from seasoned Community Action leaders of high-performing CAAs about practical steps to becoming an effective leader. We will explore ways that executive leaders maximize an organization’s impact while managing operations and compliance with applicable legal and financial requirements.

**Presenters:** Jerralynn Ness, CCAP, Community Action, Hillsboro, OR  
Bertha Proctor, SPHR, Pace Community Action Agency, Inc., Vincennes, IN  
Elizabeth “Biz” Steinberg, Community Action Partnership of San Luis Obispo Co. Inc., San Luis Obispo, CA

**Moderator:** Denise Harlow, MSW, CCAP, Community Action Partnership

**CPE Field of Study:** Personal Development  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

**After participating in this workshop you will be able to:**
- Examine different approaches to effective leadership  
- Assess your leadership skills and abilities and identify ways to strengthen them
### 5B. HR: Affordable Care Act Review: What's New?

Keeping up with evolving health care reform requirements can be a challenge for employers. This session provides an update on recent events and regulatory guidance under the Affordable Care Act (ACA) along with an overview of ACA reporting requirements for 2015. We will also review the employer mandate and the different staffing arrangements that may trigger compliance obligations. We will discuss recordkeeping requirements, rules on employer reimbursement for individual health insurance policies, self-insurance, the prognosis for proposed legislative changes and the U.S. Supreme Court’s ruling on the issue of whether tax credits will be available to consumers in states that have not established an exchange.

**Presenter:** Kristine M. Bingman, Esq., Miller Nash Graham & Dunn  
**CPE Field of Study:** Personnel/HR  
**Advance Preparation:** None  
**Prerequisites:** Familiarity with the Affordable Care Act general requirements regarding employer sponsored health plans  
**Level:** Update  
**After participating in this workshop you will be able to:**  
- Discuss impact of current ACA developments on your organization’s health plan  
- Identify actions steps for ACA compliance

### 5C. Financial: From the Auditor’s Desk - Understanding the Impact of the Uniform Guidance

Get practical advice from an experienced auditor on preparing for audits under the Office of Management and Budget (OMB)’s new Uniform Guidance, which will significantly impact Single Audits and federal grants management. This session will help you navigate Uniform Guidance changes and effective dates and provide you with tips and tools to make your organization’s next audit more efficient and cost-effective. We will discuss audit issues that are of particular interest to an organization’s board and executive staff including: updating and revising policies and procedures to comply with the new requirements; common audit findings; tools for prevention of fraud and more!

**Presenter:** Rebecca Field, CPA, CISA, CRISC, CliftonLarsonAllen LLP  
**CPE Field of Study:** Auditing  
**Advance Preparation:** None  
**Prerequisites:** Familiarity with OMB A-133 requirements  
**Level:** Intermediate  
**After participating in this workshop you will be able to:**  
- Explain fundamental auditee responsibilities related to the audit requirements under the Uniform Guidance  
- Identify grants management systems and processes that may need to be updated or revised to comply with the audit requirements under the Uniform Guidance  
- Understand some tools and tips that your organization can use to prevent common audit findings
5D. **Sustainability: Effective Special Events: It’s Not About the Napkin Colors**

That golf tournament, gala dinner or auction may seem like a good idea at the time, but too often such events consume huge amounts of staff and volunteer time with disappointing results. Special events CAN reap big rewards for your organization, in both increased visibility and dollars raised. But the key is to stay focused on the right elements and have a sound overall strategy. Join our presenters, a seasoned development professional and an experienced event planner, to learn from their experience TRIPLING the revenue of one CAA’s annual gala in just three years. Gain important tools and tips for staying focused on the elements that make events successful and draw sponsors and donors back year after year. Learn how to stop worrying about the napkin colors and start building lasting relationships through your events.

**Presenters:** Catherine Crooker, Community Action, Hillsboro, OR  
Samantha Swaim, Swaim Strategies

**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

After participating in this workshop you will be able to:

– Develop a sound event strategy focusing on the essential elements that will make the event a success  
– Assess whether or not your current or proposed event meets your overall fundraising objectives  
– Produce a compelling sponsor solicitation packet

5E. **Program: Toot Your Horns! Raise Your Voices! - Advocacy That Works!**

“Advocacy is the most effective tool nonprofits and foundations can use to advance their missions and serve their communities,” according to the Alliance for Justice. Learn how advocacy can help raise the visibility of your organization and the outstanding work it does to make the community a better place to live for everyone. We will explore how to build strong relationships with people of influence who have the potential to unlock funding or guide policy if they were to better understand the stories of your CAA and the people with whom you work. We will also address the difference between lobbying and advocacy and other important rules about political activity so you and those affiliated with your CAA can advocate with confidence and within clearly defined parameters.

**Presenters:** Marty Arellano, Washington State Community Action Partnership, Olympia, WA  
Allison Ma’luf, Esq., CAPLAW

**CPE Field of Study:** Specialized Knowledge & Applications  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

After participating in this workshop you will be able to:

– Develop approaches and strategies for advocating on behalf of your CAA and the low-income individuals and families it serves  
– Explain the differences between lobbying and advocacy and the importance of engaging in such activities  
– Educate staff and board members on the lobbying and political activity legal parameters that apply to the organization
Conference Schedule

Friday, June 12, 2015

11 am - 12 pm

Legislative Insights with David Bradley, NCAF, and U.S. Senator Jeff Merkley

Salon EF

Mutual of America
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**SPEAKER BIOGRAPHIES**

**TIM GARD, CSP, CPAE, OPENING SESSION SPEAKER**

Mr. Gard, CSP, CPAE, is a tears-in-your-eyes funny keynote speaker who teaches people to be more resilient and resourceful, and coaches organizations on how to enhance productivity and employee enthusiasm. He is a Hall of Fame Speaker, CPAE (Council of Peers Award of Excellence), an elite honor shared by 150 people worldwide and a CSP (Certified Speaking Professional). Mr. Gard has spoken at over 2,000 events worldwide from Texas to Tasmania and was selected by Meeting Planners Magazine as one of the “Best speakers ever seen or heard on the main stage.” Mr. Gard’s down-to-earth style and real-life humor leaves a lasting impression that you will benefit from for years to come. His skillful use of ordinary items in extraordinary ways and extraordinary items in everyday ways make him one of the most popular main stage speakers on the platform today. During the past two decades, Mr. Gard has traveled almost two million miles to perform, is the author of four books, and an inventor of stress reduction tools that are marketed and enjoyed worldwide.

**JEANNIE CHAFFIN, LUNCHEON 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 (HHS). She brings local, state and national level experience in anti-poverty efforts to her appointment at ACF. Prior to joining ACF, she 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. She 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, she 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. She is a graduate of Drury University with a Bachelor’s of Science in Sociology and is a Certified Community Action Professional.

**ANN LINEHAN, LUNCHEON SPEAKER**

Ms. Linehan is the Deputy Director of the Office of Head Start (OHS), within the Administration for Children and Families (ACF), at the U.S. Department of Health and Human Services (HHS). Prior to this position, she held senior management positions in OHS for 15 years overseeing the Divisions of Program Development, Quality Assurance and Program Operations. Ms. Linehan’s leadership has been instrumental in the roll out of improvements to the monitoring systems and in OHS’s efforts to implement risk mitigation strategies to improve program performance and increase accountability. Ms. Linehan began her federal career in 1992 in Region I as the Head Start Regional Program Manager responsible for Head Start programs in New England. Before joining the federal government, she was the Executive Director of a non-profit organization for nearly a decade that provided Head Start and Child Care services in eight communities in Massachusetts. She began her career as a special needs teacher for medically fragile children. Ms. Linehan holds a Bachelors of Arts in Sociology and Psychology and a Masters in Education from Boston State.
DAVID BRADLEY, LEGISLATIVE INSIGHTS SPEAKER

Mr. Bradley is the co-founder and Executive Director of the National Community Action Foundation. He has been recognized as one of Washington’s leading advocates for low income programs. He has worked with federal government representatives, members of Congress, congressional staff and key White House personnel to develop national policies dealing with low-income needs and related regulations and guidelines. 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. He 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. He 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.

U.S. SENATOR JEFF MERKLEY, LEGISLATIVE INSIGHTS SPEAKER

As Oregon’s U.S. Senator, Mr. Merkley’s goal is to make Washington work for working Americans. He is fighting to create good jobs for working Oregonians, protect consumers from predatory practices, and ensure that all Oregonians have access to high-quality, affordable education. After earning an undergraduate degree from Stanford and graduate degree in Public Policy at Princeton’s Woodrow Wilson School of Public and International Affairs, Mr. Merkley worked as a national security analyst at the Pentagon and at the Congressional Budget Office. In 1991, he returned to Oregon to lead Portland’s Habitat for Humanity, a non-profit that empowers low-income families through homeownership. Mr. Merkley went on to serve as president of the World Affairs Council in Portland before entering the Oregon House of Representatives in 1998. He became Speaker of the House in 2007. In the U.S. Senate, Mr. Merkley continues to stand up for working families. He fights to create living-wage jobs and to push back on unfair trade policies that ship Oregon’s jobs overseas. He has worked to make college more affordable and make retirement more secure for seniors. A true reformer, he led an historic coalition to fix the broken Senate by breaking up the gridlock, making it more responsive to the concerns of working families.
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**WINSTON A. ROSS, ACSW, CCAP, PRESIDENT**

Mr. Ross is the retired Executive Director of Westchester Community Opportunity Program, having served from 1984 to August 2013. He is the past President of the Yonkers Branch NAACP (1971-1978); the past First Vice President of the National Association of Community Action Agencies; the former Chairperson of the New York State Social Work Board; and past First Vice President of the National Association of Social Workers. Mr. Ross received the 1989 New York State and National Social Worker of the year Award. He has been recognized by many local organizations for his involvement in the community. He presently serves on the Board of Directors: New York State Chairperson NAACP ACT-SO, Yonkers NAACP Executive Committee, Westchester Residential Opportunities Program, Inc., and Hudson Valley Health Community Services, Inc. He was also a member of the: Westchester County Criminal Justice Advisory Board, Westchester Martin Luther King, Jr., Institute, and The Rotary Club of Yonkers/East Yonkers. Mr. Ross is a member of Metropolitan AME Zion Church in Yonkers and has chaired the Trustee Board, since 1973. Mr. Ross received his Bachelor of Science degree from New York University and his Masters in Social Work from Columbia University.

**DAVID BRIGHTBILL, VICE PRESIDENT**

Mr. Brightbill has been employed by Washington-Morgan Community Action, a private nonprofit corporation based in Marietta, Ohio 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, Mayor of the Village of Lower Salem and Chair of the Ohio University Board of Trustees. Mr. Brightbill holds a bachelor of science in education from Ohio University.

**GALE F. HENNESSY, CCAP, TREASURER**

Mr. Hennessy is the Executive Director/CEO of Southern New Hampshire Services (SNHS), the Community Action Agency for Hillsborough and Rockingham Counties, the two largest counties in New Hampshire. Hillsborough County consists of two of the largest cities in the state and 29 towns while Rockingham County includes the seaport of Portsmouth and 36 towns. Mr. Hennessy has been involved with Community Action since 1966 and has been Executive Director/CEO at SNHS since 1976. He has been active in leadership positions in Community Action throughout his career. Since 1981 Mr. Hennessy has served as the President of the New Hampshire Community Action Association, on the Board of Directors of the New England Community Action Association since 1976, as the Region 1 representative to the Board of the Community Action Partnership (the national CAA organization) since 1978, and as a founding Board Member of CAPLAW in 1994. Under his leadership, the New Hampshire Community Action Association has positioned the five New Hampshire CAAs (NH CAAs) to be a primary social service operator in New Hampshire. The NH 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 1,500 units of subsidized housing serving elderly, homeless and family populations. Mr. Hennessy attended the University of Florida and Emerson College and holds a bachelor of arts from the University of New Hampshire. He is also a Certified Community Action Professional.

**JERRALYNN NESS, CCAP, SECRETARY**

Ms. Ness is the Executive Director of Community Action serving Washington County in Hillsborough, Oregon. 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 a 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. She is a certified Community Action Professional.
CAPLAW BOARD MEMBER BIOGRAPHIES

CYNTHIA BURTON
Ms. Burton is the Executive Director for Community Service Programs of West Alabama, Inc. which provides services and resources to low-income individuals and families in Bibb, Choctaw, Fayette, Greene, Hale, Lamar, Sumter and Tuscaloosa counties in West Alabama. The services and resources her CAA offers in those communities include Head Start and early Head Start, housing, weatherization, LIHEAP, juvenile justice, meals on wheels and disaster case management. Prior to her work in Community Action, Ms. Burton spent 28 years working as a Legal Administrator and Senior Paralegal for several small law firms and as a Legal Administrator for the Legal Services Corporation of Alabama. She also spent several years as the Regional Director for the Office of Congressman Artur Davis of the 7th Congressional District in Alabama. Ms. Burton is an active member of multiple boards of directors including the National NeighborWorks Association, Chamber of Commerce of West Alabama and the Alabama State Bar Disciplinary Commission. She serves as the Board President for both the Nonprofit Council in West Alabama and the Community Action Association of Alabama. She also acts as the Finance Chairman for the Long-Term Recovery Committee of West Alabama, a state committee active in providing disaster relief and assistance, and as the Board Chairman for Maude Whatley Health Services, a nonprofit community health center in Tuscaloosa. Ms. Burton received a degree in business administration from Loyola University in Chicago, Illinois.

HAL COHEN
Mr. Cohen was recently appointed to the position of Secretary of the Vermont Agency of Human Services, the state agency that oversees multiple social service programs including the Community Services Block Grant program. Prior to the appointment, for 18 years Mr. Cohen was the Executive Director of Capstone Community Action (formerly known as Central Vermont Community Action Council). Headquartered in Barre, Vermont, Capstone serves over 18,000 people a year from numerous sites in Washington, Lamoille and Orange counties covering over 2,000 square miles in largely rural communities. Mr. Cohen’s professional and civic involvement has included sitting on a number of local and state boards such as the Vermont Council on Rural Development, the Central Vermont Workforce Investment Board, the Vermont Workforce Development Council, Food Works, EarthWalk Vermont, Central Vermont Hunger Taskforce, the Vermont Low Income Trust for Electricity and CAPLAW. Mr. Cohen has a M.A. in counseling psychology from Antioch New England Graduate School and a M.S. in nonprofit management from the New School for Social Research. He resides with his wife in Middlesex, Vermont.

KATHY DI NOLFI
Ms. Di Nolfi is the current Executive Director of Mesa Community Action Network (MesaCAN), a subsidiary of A New Leaf, a social services organization in Mesa, Arizona. She has worked in community action for 18 years, first for PREHAB of Arizona and then for MesaCAN. Ms. Di Nolfi has extensive experience in the areas surrounding domestic violence, homelessness prevention, and Community Action and has served in a variety of roles, including in direct service and administration. She holds a bachelor’s degree in social relations from the University of California, Riverside.

PAMELA LA FRENZ, CCAP
Ms. La Frenz is Executive Director of the Missouri Valley Community Action Agency (MVCAA). She has been with MVCAA for 32 years and has over 43 years of experience with the Community Action network. Before becoming Executive Director, she served as Head Start Director of MVCAA for 26 years and helped lead the Program in special projects such as the Special Quest Team; Head Start/TANF Demonstration Initiative; Strengthening Partnerships and Community Resources with Literacy (SPARC) team; and State of Missouri’s Tier One Partner for the Fathers For Life initiative. She currently serves as a board member for a number of organizations including Missouri Association of Community Action; Missouri Head Start Association; Missouri Head Start Council; and the National Head Start Association. Ms. La Frenz has served on several state level committees including Head Start/Community Action Agency Memorandum of Understanding State Team and the Special Quest Team for State of Missouri. She is at Level 4C on the Missouri Career Lattice in the Missouri Professional Achievement and Recognition System–OPEN Initiative and has completed the Missouri Non Profit Leadership Program through the Harry S. Truman School of Public Affairs at the University of Missouri-Columbia. Ms. La Frenz holds a bachelor of science in elementary education and is a graduate of the Johnson and Johnson Fellows Program at University of California, Los Angeles. She is also a certified Community Action Professional.
CAPLAW BOARD MEMBER BIOGRAPHIES

DOUGLAS RAUThE
Mr. Rauthe is the retired Executive Director of Community Action Partnership of Northwest Montana, a multi-faceted Community Action Agency that serves four counties of northwestern Montana. He served as the Executive Director for 20 years during which time the agency provided 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 on the Board and immediate past-President of the Region VIII Community Action Partnership, which serves Montana, Colorado, Utah, North and South Dakota and Wyoming. 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 numerous other boards and committees.

SANDRA SEWELL, JD
Ms. Sewell is the Executive Director/CEO of AJFC Community Action Agency, Inc. (AJFC) headquartered in Natchez, Mississippi. AJFC provides services and resources to low-income individuals and families in Adams, Amite, Claiborne, Copiah, Franklin Jefferson, Lawrence, Lincoln and Wilkinson counties in southwest Mississippi. The services and resources offered through AJFC include Head Start, Early Head Start, CSBG and LIHEAP. Ms. Sewell has worked for AJFC for more than 20 years in various capacities and became Executive Director in 2009. Prior to her work with AJFC, Ms. Sewell worked as an Attorney for Legal Services. Ms. Sewell serves on the board of directors of several boards, including Mississippi Association of Community Action Agencies, Southeast Association of Community Action Agencies and Central Mississippi Planning and Development District and is affiliated with numerous professional and civic organizations. Ms. Sewell received a bachelor’s degree from Alcorn State University, a master’s degree from Texas Southern University and a law degree from Thurgood Marshall School of Law.

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FACTORY BIOGRAPHIES

JERI ALCOCK, CFRE
Ms. Alcock, CFRE, is a data crusader who has spent her career serving the nonprofit sector and is passionate about helping great causes to find their greatest champions. After seven years as a fundraising consultant, Ms. Alcock established DonorDynamics (www.donordynamics.com), a prospect screening software to help organizations to start or grow their major gift programs. DonorDynamics was acquired by DonorSearch in 2015. Ms. Alcock now works for DonorSearch, the fastest growing prospect screening company in the nation. Early in her fundraising career, Ms. Alcock served as Director of Development for Community Action Organization, Interim Director of Development for SOLVE, Oregon Lions Sight & Hearing Foundation, and the World Forestry Center. She was an Associate Consultant for Nonprofit Association of Oregon until recently and was a founding member of NAO’s Interim Development Director Program. Ms. Alcock promotes a spirit of philanthropy and leads nonprofit entities in strengthening their organizations and furthering their missions through data-driven decision making.

MARTY ARELLANO
Ms. Arellano coordinates the Advocacy Education Project for Washington State Community Action Partnership. She designs and conducts tailored training sessions and provides technical assistance and support for staff, boards and clients of the 30 Community Action Agencies fighting poverty throughout Washington state. Ms. Arellano is a seasoned leader with extensive skills and experience in the public and private, non-profit sectors. She previously served as Community Action Director for Snohomish County’s Human Services Department. Ms. Arellano is passionate about helping people from all walks of life to find and use their voices to support the people, programs and issues important to them. She received a B.A. in Social Psychology from The Evergreen State College and a Masters in Cultural Anthropology from Western Washington University.

KRISTINE M. BINGMAN, ESQ.
Ms. Bingman is Counsel at Miller Nash Graham & Dunn LLP in the firm’s employee benefits and employment practice. She brings more than a decade of experience advising employers on health and welfare plans and employment law matters. Her practice includes advising clients about all aspects of ERISA and Internal Revenue Code compliance as it relates to employee benefit plans, as well as drafting and amending plan documents. She assists clients regarding health care reform, COBRA, HIPAA privacy and portability, nondiscrimination rules, and reporting and disclosure requirements. Ms. Bingman also has extensive experience advising clients on all aspects of employment law, including wage and hour, leaves of absence, state and federal disability laws, harassment and discrimination, discipline and termination, drafting and reviewing employee handbooks and workplace policies, and responding to complaints filed with the Oregon Bureau of Labor and Industries. She is an experienced public speaker on a variety of benefits- and employment-related topics. Before joining the firm, Ms. Bingman worked as associate general counsel of United Employers Association, where she provided legal compliance support to the United Metal Trades Association Trust and counseled Pacific Northwest employers on legal issues related to employment law and employee benefits. She is a graduate of Pacific Lutheran University and Lewis & Clark Law School.

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

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 recently published two new books as part of her “In the Trenches” manuals: “The Invisible Yellow Line: Clarifying Nonprofit Board and Staff Roles” and “The Nonprofit Guide to Social Enterprise: Show Me the (Unrestricted) Money!” Ms. Block has also written...
the nonprofit books: “FUNdrasing! 180+ Great Ideas to Raise More Money,” “The ABCs of Building Better Boards,” and Fast FUNdraising Facts for Fame & Fortune.” Visit her web site at www.jblockinc.com to learn more, sign up for her free newsletter and download free useful forms.

TANYA BRODER, ESQ.

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

TILLMAN COFFEY, ESQ.

Mr. Coffey is a Partner in the Atlanta office of 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 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. Mr. Coffey graduated with highest honors from Middle Tennessee State University and with honors from University of Tennessee College of Law.

CATHERINE CROOKER

Ms. Crooker recently joined Community Action in Hillsboro, Oregon bringing over 20 years of 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. She is a graduate of Oberlin College.

CINDY CUMFER, ESQ.

Ms. Cumfer maintains a private law practice in Portland, working exclusively with nonprofit organizations around the region. She has represented thousands of nonprofit groups as an attorney since 1978. Her clients cover a wide spectrum of nonprofit organizations and she provides services for all phases of nonprofit life. Ms. Cumfer is the co-author of The Oregon Nonprofit Corporation Handbook, now in its fifth edition. She developed and taught Nonprofit Law at Lewis & Clark Law School and currently teaches a seminar session on nonprofit organizations for the Small Business Legal Clinic there. She has presented hundreds of workshops to nonprofit board members, executive directors, staff, volunteers, lawyers and accountants on nonprofit issues. Ms. Cumfer has been a speaker at more than a dozen CLE conferences on nonprofit topics and is the author of numerous CLE chapters on nonprofit topics for lawyers and accountants. She was the recipient of the Oregon State Bar President’s Membership Service Award in 1996. Ms. Cumfer also has a PhD in history from UCLA, taught a course at Reed College on nonprofit history in the United States and is interested in exploring why our nonprofit heritage matters to us today.

ELEANOR EVANS, ESQ.

Ms. Evans is Executive Director and General Counsel of Community Action Program Legal Services, Inc. (CAPLAW) and General Counsel to Action for Boston Community Development, Inc. (ABCD). Ms. Evans advises Community Action Agencies nationwide on a broad range of legal, governance and compliance matters; writes publications; and presents workshops
FACULTY BIOGRAPHIES

throughout the country on those matters. Before holding these positions, Ms. Evans was CAPLAW’s Deputy Director and Senior Counsel. Prior to joining CAPLAW, she 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.

REBECCA FIELD, CPA, CISA, CRISC

Ms. Field is a Certified Public Accountant, Certified Information Systems Auditor and Certified Information Reporting Systems Specialist and serves as a Manager in the nonprofit and government group at CliftonLarsonAllen LLP. She has eleven years of public accounting experience and works exclusively with nonprofit organizations. She specializes in single audits and has extensive knowledge in related regulations and requirements. Ms. Field also serves as a firm wide assurance resource where she oversees compliance with professional standards, provides technical assistance, and assists with training curriculum. She graduated from the University of Minnesota, Duluth with a degree in in accounting.

DENISE HARLOW, MSW, CCAP

Ms. Harlow is the Chief Executive Officer for the Community Action Partnership. Prior to this position, she served as Interim Chief Operating Officer and the Senior Director of Training and Technical Assistance. Ms. Harlow has more than 25 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 Senior Vice President for Capacity Building at the New York Council of Nonprofits. Ms. Harlow has served on several nonprofit boards of directors as was an appointee to the Governor’s Early Childhood Advisory Council in New York. She has a Masters Degree in Social Work from the University at Albany with a focus on nonprofit management where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society. Ms. Harlow holds a Bachelor’s Degree in Social Work from Valparaiso University.

MARK JACOBS, ESQ.

Mr. Jacobs is a Partner for the national employment and labor law firm Fisher & Phillips LLP in their Irvine, California office. His practice focuses on defending employment related lawsuits and administrative complaints on a variety of issues, including harassment, retaliation, and discrimination. Mr. Jacobs has experience in handling complex, multi-plaintiff harassment and discrimination matters, wage and hour, and other administrative matters. Prior to joining the firm, Mr. Jacobs worked as a Legislative Aide in the California State Assembly and served as a Deputy Attorney General in the California Attorney General’s Office. He is a graduate of the University of Redlands and the University of the Pacific’s McGeorge School of Law.

JANET S. JOHNSON, CPA, CMA

Ms. Johnson is a Certified Public Accountant and Certified Management Accountant and serves as Senior Manager at Wipfli. She uses her background in auditing and process analysis to provide training on federal regulations that is focused on operational results. She presents in-person and Internet-based training to nonprofit and governmental organizations on the rules they must follow when receiving federal funds. Ms. Johnson’s goal is to help managers and staff understand how to be effective and efficient in achieving their mission while maintaining compliance with regulations. Ms. Johnson also provides consulting services that help nonprofit organizations and governmental entities develop organization-specific fiscal policies and procedures that incorporate effective internal controls. She also assists nonprofits with the development of cost allocation plans that meet their needs as well as those of the funders. She graduated from the University of Wisconsin, Madison with an undergraduate degree in accounting and a master’s degree in quantitative analysis with an emphasis in total quality management.

TIM JOHNSTONE

Mr. Johnstone serves as the Chief Strategy Officer for Hopelink, a large Seattle area non-profit that helps people in poverty become stable and equips them to permanently exit poverty. He also leads the Lyndon Project, a collaboration of 54 Community Action Agencies in Idaho, Oregon and Washington States committed to growing the impact of the Community Action network.
on individuals and communities by clearly demonstrating value through measurable outcomes and the creation of a culture of innovation and accountability. Prior roles include the President of Johnstone Advantage Consulting Group, a boutique consulting firm that specialized in strategy development and execution and sales management development; CEO of a specialty shoe manufacturer; Senior Vice President and Division Manager of a JP Morgan Chase unit; and Vice President of Operations & Manufacturing of a telecommunications company. He currently serves on the Boards of Express Advantage and Express Opportunities, and is Board President of The Prosperity Agenda. He and his wife live in Redmond, Washington and have three grown children.

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

CHRISTOPHER LOGUE, ESQ.
Mr. Logue is a Staff Attorney at CAPLAW where he trains and advises community action agencies on a range of legal issues, including governance, employment law, Head Start, board responsibilities, and tax-exempt organization law requirements. Before joining CAPLAW, Mr. Logue managed the Legal Advocacy Program at Casa Myrna, a Boston-based nonprofit organization that provides services to low-income victims of domestic violence. He is a graduate of the University of Massachusetts and Northeastern University School of Law.

ALLISON MA‘LUF, ESQ.
Ms. Ma‘luf is Deputy Director and Senior Counsel at CAPLAW where she trains and 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.

KATRINA METZLER
Ms. Metzler is the Energy Services Director for the National Association for State Community Services Programs (NASCSP). She recently comes to the position having previously led the weatherization program at the State of Ohio. Last year, she was elected by her peers as the weatherization chairperson for NASCSP and also served on the State Energy Advisory Board. Ms. Metzler has experience at the local level as the Director of New Business Development for the Pickaway County Community Action Agency. Prior to that, she was the Director for Adult Education in Pickaway County, working in adult literacy for more than 14 years. Her career has been dedicated to community service and advocating for those in need.
YEE LEE MCGEE, CPA

Ms. McGee is a Certified Public Accountant and Partner at Gary McGee & Co. LLP. She joined the firm following two years on the accounting staff at Warner Pacific College and has devoted her entire professional career to serving public and private nonprofit institutions. While the majority of her practice focuses on the provision of audit services, she also advises organizations on a range of technical accounting matters and leads the firm’s exempt organization tax practice. She is a frequent speaker at conferences and workshops sponsored by the Oregon Society of Certified Public Accountants, the Nonprofit Association of Oregon, Northwest Business for Culture and the Arts, and by clients of the firm on topics such as tax compliance, financial statement audit issues, and other technical financial and accounting topics impacting the nonprofit sector. Ms. McGee is actively involved in the firm’s in-house training program, and is a member of the Oregon Society of Certified Public Accountants’ Nonprofit Special Interest Team and of the American Institute of Certified Public Accountants. She graduated from the University of Oregon with a degree in accounting.

BARBARA J. MOONEY, ED.D., NCRT

Dr. Mooney is a Research Fellow with National Association for State Community Service Programs’ (NASCSP) ROMA Next Generation Center of Excellence. She has been the Project Director of the National ROMA Training Network for 12 years, is currently continuing that role through the Association of Nationally Certified ROMA Trainers, and is co-author of Introduction to ROMA. Dr. Mooney also works with the CSBG Region Three Performance and Innovation Consortium (RPIC) and with Temple University’s National Family Development Board which leads the training effort for Strengths-based Family Workers (SFW). She is an Adjunct Professor at Waynesburg University and has conducted numerous research and evaluation projects for both private and government funded programs and services.

Dr. Mooney was the Training Director at the Community Action Association of Pennsylvania for 9 years, after working 18 years in a local CAA in Pennsylvania as the Director of Family Development. Prior to becoming involved in the CAA network, she worked in Pennsylvania with Catholic Charities, a regional Public Library System, and local Adult Education Programs. Prior to that, Dr. Mooney worked in NYC as a caseworker, casework supervisor (Department of Welfare), community organizer (Department of Human Services) and as a substitute high school teacher.

MERRITT MOUNT

Mr. Mount is the Executive Director of the Washington State Community Action Partnership (WSCAP). His work is driven by a keen interest in what makes teams and organizations successful at achieving their goals and getting the results they desire. Over the past 30 years that interest has taken him to Latin America, the Caribbean, Australia, New Zealand, Europe, Japan, and Nepal. He has worked with many different kinds of organizations ranging from start-ups to multinationals, and from small non-profits to large public agencies. Mr. Mount’s experience as a staff member, manager, executive, and consultant spans a wide variety of industries and disciplines, including telephony, publishing, high tech, communications, venture capital, social services, health care, and education. In his leadership role at WSCAP, he draws on this diverse and deep experience to help agencies and teams identify and build on their synergies and unique strengths to improve performance and achieve goals in addressing poverty in Washington State. Mr. Mount holds a Bachelor of Arts in Psychology from The Evergreen State College and a Master of Business Administration from the Thunderbird School of Global Management.

JERRALYNN NESS, CCAP

See biography on page 37.

RICK PINS, ESQ.

Mr. Pins is a Partner in the labor and employment law practice groups at Stinson, Leonard, Street LLP. He splits his practice equally between the labor and employment disciplines, and both counsels and litigates on behalf of clients. Mr. Pins also has considerable commercial litigation experience. 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 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. Mr. Pins 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. He has been regularly selected for inclusion in both Super Lawyers® and Top 40 Employment Super Lawyers®. Mr. Pins received his bachelor’s degree in Economics and Political Science from the University of Wisconsin-Madison and his law degree from the University of Minnesota Law School.

**DR. BERTHA PROCTOR, SPHR**

Dr. Proctor is currently Chief Executive Officer (CEO) of Pace Community Action Agency. She previously provided leadership within the Community Action Network by serving as a Program Director and Executive Director/Head Start Director. She currently serves on various boards, conducts state and national trainings, and has served as an adjunct faculty member at local universities. She also has developed and implemented a variety of management systems and business initiatives. Leadership training and staff development are her forte and stem from her advanced education in Communications, Human Resource Development, and Educational Leadership.

**DAVE RINEBOLT, ESQ.**

Mr. Rinebolt has served as Executive Director of Ohio Partners for Affordable Energy (OPAE) since 1996. OPAE is a non-profit organization representing the interests of low-income, residential, small business and non-profit consumers on energy issues in Ohio. Mr. Rinebolt represents OPAE before the Public Utilities Commission, the General Assembly, and Congress, working to promote affordable energy policies for low and moderate income customers. He is also responsible for managing over $16 million in weatherization programs for seven utilities and three fuel funds. Mr. Rinebolt has over 30 years of experience in dealing with policy issues relating to energy and natural resources. He has worked on Capitol Hill, for the Bureau of Land Management at the Department of the Interior, for the Governor of Minnesota, and the Coalition of Northeastern Governors. Mr. Rinebolt served as Director of Research for the National Wood Energy Association and was counsel to a number of renewable energy trade associations. He also served as Director of Programs for the National Association of State Energy Officials. He holds a Bachelor of Liberal Studies Degree from Bowling Green State University and a Juris Doctor Degree from the Columbus School of Law at the Catholic University of America. His education and work experience have concentrated on state/federal relations and the operational aspects of joint state/federal programs, with a concentration on energy issues.

**KEN ROBINETTE**

Mr. Robinette has been with the South Central Community Action Partnership (SCCAP) in Twin Falls, Idaho for 36 years. He has been the Executive Director for the past 14 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youths, ages 16 to 18 years old. In 1981, Mr. Robinette became the Director of the Weatherization/Housing Rehab program for SCCAP and was responsible for the Administration and Programmatic aspects of the DOE Weatherization and USDA/Rural Development Housing Preservation Programs. In 2006, his organization created a for-profit LLC company called Home Energy Management which is owned by SCCAP and provides weatherization services for middle to upper income homeowners with the profits going to support SCCAP’s low-income programs. Mr. Robinette is currently the Vice President of Energy Outwest, an organization of energy conservation professionals in the western United States that promotes and advances the technical capacity of the region’s environmental and energy services network and provides quality service targeting, but not limited to, low-income households.

**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 (CAA) 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 CAAs and address 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 CAAs and affordable housing organizations. Ms. Sohl is a licensed public accountant and graduate of Antioch College and University of California at Berkeley. She has a masters in teaching from Reed College and completed post-graduate work in accounting and business law at Portland State University.

**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. Ms. Steiger is an emeritus member of the CAPLAW board of directors.

**ELIZABETH “BIZ” STEINBERG**

Ms. Steinberg has been the CEO of Community Action Partnership of San Luis Obispo for 35 years. She currently serves as the 3rd Vice Chair of the National Community Action Partnership Board of Directors; as a member of the National Community Action Partnership Excellence Commission; and as Chair of the Head Start Task Force. In addition, Ms. Steinberg serves on the CAFI Board and is a Board Member on the National Head Start Association (NHSA) Board. She is past President of the National Migrant and Seasonal Head Start Association and serves on the San Luis Obispo (SLO) Workforce Investment Board, SLO Housing Authority, Children’s Services Network, Mission Community Services Corporation, and is on the Child Development Policy Institute (CDPI) of California. Ms. Steinberg holds a Bachelor of Science in Home Economics from the University of Wisconsin and completed graduate work from California Polytechnic State University. She holds a Lifetime Community College Teaching Credential.

**SAMANTHA SWAIM**

With more than 16 years of event planning and fundraising expertise, Ms. Swaim focuses on how to maximize the potential of any fundraising event. She is a passionate supporter of the nonprofit world and believes strongly that the volunteers and visionary leaders working in nonprofits are at the center of positive change that is making our communities stronger. Ms. Swaim is a strategist, a teacher and a producer with flair. Her professional career began in TV and theatre production. While working for the Grammy Awards she was introduced to event planning for charity and found her passion. She then began working in non-profit development for various arts groups and health organizations. Ms. Swaim’s passion is implementing strategy and education to provide nonprofit leaders with the tools that they need to increase their fundraising and reduce their workload. By designing an event that uniquely engages an organization’s support base and is tied closely to the organization’s mission, she works to bring a high level of production that captures both the fun and the funds.

**ANN SWINDELL, CPA**

Ms. Swindell is a Certified Public Accountant and Manager with CliftonLarsonAllen LLP, where she serves nonprofit, business and individual clients in all areas of tax compliance, business consulting, and accounting. She has significant experience with highly complex federal and state tax returns. Ms. Swindell has expertise working with nonprofit clients in the areas of building and maintaining proper governance, reporting unrelated business income, preservation of exempt and public charity status, and proper disclosure of sensitive transactions on Form 990. She holds a B.A. in Humanities from Washington State University and completed coursework at Boise State University in accounting and business requirements for the CPA exam.
FACULTY BIOGRAPHIES

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

DENES L. TOBIE, CPA
Ms. Tobie is a Certified Public Accountant and Partner in Wipfli LLP’s nonprofit and government practice (NGP). She oversees audit engagements and consulting opportunities and works with clients to maintain compliance with laws and regulations. In addition, she also oversees the NGP’s training practice. As a leader of this practice, Ms. Tobie trains nonprofits and government agencies in regulations, best practices, and governance. She graduated from University of Wisconsin, Platteville with a degree in accounting and business administration.

DAVID TRIMNER, CPA
Mr. Trimner is a Certified Public Accountant and Principal at CliftonLarsonAllen LLP (CLA). He has provided specialized tax consulting and compliance services to several hundred tax-exempt clients over his 17 year career. He provides Federal and state tax services, focused primarily on public charities, private foundations, trade associations, healthcare organizations and higher education institutions. Mr. Trimner devotes himself to thorough comprehension of the rules and regulations critical to charitable and tax-exempt entities as well as assisting in the preparation of tax filings designed to enhance an organization’s image with contributors, the media and the general public. He also assists clients on a variety of other issues including unrelated business income, intermediate sanctions, obtaining and maintaining exempt status, Internal Revenue Service (IRS) examinations, executive compensation and benefits disclosures, and state solicitation requirements. Prior to joining CLA, Mr. Trimner was a Tax Partner with BDO USA and a tax manager with PricewaterhouseCoopers. He has a Masters of Taxation from American University and a B.A., Accounting from James Madison University.

YASMINA VINCI
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 Masters in Public Administration from Harvard’s Kennedy School of Government. She brings to her NHSA role over ten years of executive director experience at NACCRA, another national early childhood organization serving low-income families. She also worked in state government where 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. 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.

VERONICA ZHANG, ESQ.
Ms. Zhang is a Staff Attorney at CAPLAW, where she advises community action agencies nationwide in strategic and operational matters and counsels them on a broad range of legal issues, including tax-exempt law, Head Start and other government grants, corporate governance and compliance. Prior to joining CAPLAW, Ms. Zhang was a corporate associate at Goodwin Procter LLP, where she represented public and private biopharmaceutical and technology companies in mergers and acquisitions, public securities offerings and other strategic collaborations, as well as counseled early-stage companies and non-profit organizations on formation and governance matters. Ms. Zhang is a graduate of Yale University and Boston University School of Law.
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